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**ARTICLES**

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# NATIONAL LIBRARY OF POLAND AND KABA SUBJECT HEADING LANGUAGES AND THEIR EVOLUTION TOWARDS NATIONAL LIBRARY OF POLAND DESCRIPTORS

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## INTRODUCTION

In this article<sup>1</sup> we examine the evolution of subject heading languages (SHLs) as demonstrated by two of the languages used most often for subject indexing in Polish library catalogues in the late twentieth and early twenty-first century: the subject heading language of the National Library of Poland (henceforth SHL NLP) and the subject heading language KABA (SHL KABA). We also discuss the next stage in that evolution, namely the creation of the post-coordinated indexing language which has been in development by the National Library of Poland since 2017, known as the National Library of Poland Descriptors (henceforth NLPD).

Research into the language of subject headings generally takes a diachronic approach. The diachronic method, which originates in diachronic linguistics, was introduced by Ferdinand de Saus-

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<sup>1</sup> This article is an adapted version of part of my doctoral dissertation, defended on April 10th, 2019, at the Faculty of Management and Social Communication of the Jagiellonian University (supervisor: Professor Wiesław Babik).

sure. Unlike synchronic linguistics, diachronic linguistics brings a chronological perspective to the study of linguistic phenomena. It was traditionally used in the analysis of natural languages, although it has become somewhat less popular in recent years. Diachronic linguistics looks at how a language changes and evolves over time.

Changes in artificial languages take place much faster than in natural languages and are easier to see, which makes the diachronic perspective particularly interesting when analysing artificial languages. Saussure distinguishes between two dimensions when analysing the evolution of languages:

External history - external factors (cultural, political, other)

Internal history of the language system

In the case of artificial languages, it is the external history that imposes changes on the language system; changes in the language system result from alterations in its environment. For information and search languages (ISLs), alterations in the environment can be of the follow types:

Changes in the needs of users

Technological changes - integrated systems, software and so on

Social changes - the sociological perspective, influenced by the creation of the Internet

As they evolve, artificial languages are “witnesses” to these external changes.<sup>2</sup> ISLs, as communication tools, must adapt to them. The external changes force the languages of subject headings that we discuss here to gradually evolve.

The issue of the evolution of the syntax of subject heading languages, which I treat in this article, has been discussed on multiple occasions in the Polish and foreign specialist literature. As far

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<sup>2</sup> A. Picton, *Diachronie en langue de spécialité. Définition d'une méthode linguistique outillée pour repérer l'évolution des connaissances en corpus. Un exemple appliqué au domaine spatial*, Toulouse, Université Toulouse le Mirail - Toulouse II, 2009, p. 58 - <https://tel.archives-ouvertes.fr/tel-00429061> [accessed 14.12.2019].

as the languages discussed here are concerned – the languages on which the post-coordinated NLPD was based – key studies include Jadwiga Sadowska's *Hasła przedmiotowe w teorii Adama Łysakowskiego i praktyce „Przewodnika Bibliograficznego”* [“Subject headings in the theory of Adam Łysakowski and in practice in *Przewodnik Bibliograficzny*”], published in 2000, and the same author's *Język hasel przedmiotowych Biblioteki Narodowej. Studium analityczno-porównawcze* [“The language of subject headings of the National Library. An analytical and comparative study”] from 2003. The latter work contains highly valuable comments comparing the changes taking place in the two subject heading languages analysed here, SHL NLP and SHL KABA, illustrated with a wide range of examples.

A somewhat more theoretical approach is found in the studies of Jadwiga Woźniak-Kasperek, who points out general trends emerging in the development of ISLs in the network age. Her key work in this field is *Wiedza i język informacyjny w paradygmacie sieciowym* [“Knowledge and information language in the network paradigm”], dating from 2011. Also worthy of note is her 2017 study co-authored with Bartłomiej Włodarczyk, *Język Hasel Przedmiotowych Biblioteki Narodowej* [“The language of subject headings of the National Library”]. The study is a record of SHL NLP at the time when it was replaced by the new language NLPD and thus has an archival value, but it also contains valuable information on the changes that had taken place in SHL NLP since its creation.

The changes occurring in the syntax of SHL KABA (simplification of the list of subheadings, of the rules for the use of particular headings, and of the structure of headings consisting of a topic and a subheadings) took as a prototype the modifications made to the language RAMEAU.<sup>3</sup> These changes are described in two articles by Michel Mingam: *RAMEAU: bilan, perspectives*<sup>4</sup> [“RAMEAU: assess-

3 Répertoire d'autorité-matière encyclopédique et alphabétique unifié (RAMEAU) – the language used for subject headings in French library catalogues and the original model for the methodology and vocabulary of SHL KABA.

4 M. Mingam, *RAMEAU: bilan, perspectives* in: *Bulletin des bibliothèques de France*, No. 5, 2005, <http://bbf.enssib.fr/consulter/bbf-2005-05-0038-001> [accessed 21.04.2020].

ment and outlook”] dating from 2005 and *RAMEAU: les catalogues, le web*<sup>5</sup> [RAMEAU: the catalogues, the Web] from 2015. Mingam pays particular attention to the complicated nature of the syntax of RAMEAU, which in turn affects the nature of the syntax of SHL KABA.

A very interesting work on the subject heading languages that we discuss in this article is Bartłomiej Włodarczyk’s doctoral thesis *Mapy tematów w językach hasel przedmiotowych* (“Topic maps in subject heading languages”), published in 2016.<sup>6</sup> In his study the author attempts to transform SHL NLP into topic maps. The work is purely theoretical in nature but nevertheless represents a significant contribution to thinking on attempts to implement the vocabulary of languages created to meet the needs of card catalogues using modern technologies.

The main section of the present article is a presentation of selected problems related to the syntax of subject heading languages, using as examples structures occurring in SHL NLP and SHL KABA. The examples from SHL KABA come from the NUKAT catalogue database<sup>7</sup>, while those from SHL NLP come mainly from existing studies of the language (references are included in the text). My starting point is an analysis of the different ways of expressing a subject, the “aspect” (Polish: *ujęcie*) of a subject in a publication and the relationship between subjects in the languages in question. I also propose ways of transforming these structures into post-coordinated language. The elimination of the syntax of a pre-coordinated language is very often associated with changes in the area of vocabulary. It should be noted that the approach presented below is merely a proposal; in some cases more than one solution is possible.

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5 M. Mingam, *RAMEAU: les catalogues, le web* in: *Bulletin des bibliothèques de France*, No. 5, 2015, [http://bbf.enssib.fr/matières-a-penser/rameau-les-catalogues-le-web\\_66265](http://bbf.enssib.fr/matières-a-penser/rameau-les-catalogues-le-web_66265) [accessed 21.04.2020].

6 B. Włodarczyk, *Mapy tematów w językach hasel przedmiotowych*, Warszawa 2016.

7 See <http://katalog.nukat.edu.pl/search/query?theme=nukat>.

## SYNTAX – DESCRIPTION AND EVOLUTION TOWARDS NLPD METHODS OF EXPRESSING THE SUBJECTS OF DOCUMENTS IN SUBJECT HEADINGS

Adam Łysakowski's theory of the subject catalogue forms the basis for the methodology of SHL NLP, as can be seen from the structure of the subject headings. In the methodology of SHL KABA, by contrast, it is difficult to see the principles of Łysakowski's theory in unaltered form, although reference is made to his works.<sup>8</sup>

In the remainder of this article we present some examples of the differences between Łysakowski's theory and the methodology of SHL KABA. These differences create significant problems when trying to bring the two languages together, although they do not render the task quite impossible. We do not attempt to give a complete exposition of the syntax of the languages in question but rather focus on those elements whose transformation into a post-coordinated ISL brings to light problematic issues, for example, incorrect recording in the working format or an incorrect interpretation of Łysakowski's principles. The purpose of my analysis is to demonstrate that it is necessary to properly understand ISLs as they were used prior to computerisation (and recording in MARC format) in order to steer their further evolution in the right direction.

In Łysakowski's theory, the order of the elements in the part of the heading expressing the subject is highly significant. The "topic" – that is, the first part of the heading – should express the subject of the document (publication) while the following parts may express the properties, aspect and other features of the subject.<sup>9</sup> There are many exceptions in how these requirements are implemented in the languages we analyse here.

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8 T. Główacka, *Katalogowanie przedmiotowe w języku KABA*, Part 1, *Analiza dokumentu i jego opis przedmiotowy*, Warszawa 2003, pp. 7–8, 17.

9 A. Łysakowski, *Katalog przedmiotowy. Podręcznik*, Warszawa 1946; cf. idem, *Katalog przedmiotowy*, Part 1, *Teoria*, [introduction by J. Woźniak, ed. M. Banacka], 2<sup>nd</sup> ed., Warszawa 2002 - <http://bbc.uw.edu.pl/publication/650> [accessed 14.12.2019].

## SUBJECT EXPRESSED IN THE TOPIC OF THE HEADING

The “topic” in an extended subject heading is defined as “the elementary lexical unit - the auto-syntactic expression of the subject heading language - which comes first in the subject heading”.<sup>10</sup> In some cases the syntax of the extended heading brings about a change in the type of element used. A special case of the influence of the syntax (position in the subject heading) on the type of initial element used in an extended heading involves the use of a geographical location as the topic of a subject heading, whether simple or extended.

The MARC 21 format for recording elements in the subject description of library documents does not as a rule foresee the use of a geographical name in any other sense than to indicate the location of the subject. One exception here is the name of a collective territorial body, where the first element is a geographical name; this is not recorded as a subject in the bibliographic record in field 651 (151 authority file record) but rather in field 610 (110 authority file record), e.g. 610 1. /a Polska. /b Urząd Bezpieczeństwa (established heading in SHL KABA).

The lack of flexibility in records in MARC format clearly shows an attempt to transform the elements of a pre-coordinated language containing a geographical name into post-coordinated form. The designators expressed in the geographical name include geographical area, political/administrative state and historical state.

Examples of SHL NLP and SHL KABA headings with a geographical name:

Geographical area:

SHL NLP: 151 .. /a Konin (woj. wielkopolskie ; okrąg) /x fauna

SHL KABA: 151 .. /a Polska /x ludność

Political/administrative state:

SHL NLP: 151 .. /a Polska /x polityka międzynarodowa

SHL KABA: 151 .. /a Polska /x stosunki /z Francją

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10 B. Bojar, *Słownik encyklopedyczny informacji, języków i systemów informacyjno-wyszukiwawczych*, 2<sup>nd</sup> ed., Warszawa 2002, p. 272 - <http://bbc.uw.edu.pl/publication/639> [accessed 14.12.2019].

Geographical area with historical name:

SHL NLP: 151 .. /a Jugosławia /x emigracja /y od 1991 r.

SHL KABA: 151 .. /a Związek Radziecki /x emigracja i imigracja

Extraterrestrial geographical area:

SHL NLP: 150 .. /a Mars (astr.) /x badanie /x projekty<sup>11</sup>

SHL KABA: 151 .. /a Księżyc /x aspekt symboliczny

Fictional geographical area:

SHL NLP: 151 .. /a Atlantyda /x a kultura masowa

SHL KABA: 150 .. /a Atlantyda /v komiksy

The majority of geographical names can function as either a topic or a subheading in the extended subject heading. Łysakowski also attempted to solve this problem, stating that a “geographical entity may only be the topic where it represents the main subject of the work”.<sup>12</sup> The specific instructions in Łysakowski’s theory also reveal the heading 151 .. /a Polska /x gospodarka to be incorrect where the subject of the document is a farm located in Poland. According to Jadwiga Sadowska, failure to observe Łysakowski’s recommendation here, as is current practice in SHL NLP, should be considered a mistake.<sup>13</sup>

According to the methodology for transforming extended headings in SHL NLP and SHL KABA into post-coordinated form, the topic expressed in the geographical name in these cases should become a “geographical descriptor”, whose function is to indicate the location of the subject. The element resulting from the transformation of the subject subheading, on the other hand, becomes the subject. In the example above, the subject descriptor would be *Gospodarka* and the geographical descriptor *Polska*. Here are some further examples<sup>14</sup> of SHL NLP headings where it would be necessary to carry out this type of transformation:

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<sup>11</sup> For Łysakowski, astronomic entities fall under geographical entities; this changed in SHL NLP, where they are considered common names.

<sup>12</sup> A. Łysakowski, *Katalog przedmiotowy...*, p. 156.

<sup>13</sup> J. Sadowska, *Hasła przedmiotowe w teorii Adama Łysakowskiego i praktyce „Przewodnika Bibliograficznego”*, Warszawa 2000, p. 132.

<sup>14</sup> *Poradnik JHP BN* (guidebook of SHL NLP).

- 151 .. /a Śląskie, województwo (1918-1939) /x aptekarstwo  
150 .. /a Aptekarstwo; 151 .. /a Śląskie, województwo (1918-1939)<sup>15</sup>  
151 .. /a Lwów (Ukraina) /x sądownictwo  
150 .. /a Sądownictwo; 151 .. /a Lwów (Ukraina)

This freedom in constructions with geographical names in extended headings is not found in SHL KABA due to the adoption of a methodical solution permitting or prohibiting the use of geographical subheadings after subject topics or subject subheadings. For example, subject subheading 180 .. /x emigracja i imigracja is a subheading used after a topic expressed in a geographical name, and a geographical subheading may not be used after it. Details of whether a geographical subheading may or may not be used are given in the records (in MARC 21 format) for established headings in SHL KABA in fixed-length fields (field 008/06 authority file record). For comparison, in RAMEAU this information is also visible, in editable form, to users who are not familiar with the working format. Coding this information in the record of the established heading in SHL KABA, where it is not accessible to users of the library catalogue, does not help users with their search queries. The established heading 150 .. /a Emigracja i imigracja may also be used as a topic in an extended heading, but a geographical subheading may not be used after it. As a result, the extended heading 151 .. /a Francja /x emigracja i imigracja is correct, whereas the extended heading 150 .. /a Emigracja i imigracja /z Francja would be incorrect.

Although this rule creates correct, consistent extended headings, the dual construction with geographical names is neither clear nor rational for users unfamiliar with SHL KABA methodology, even if they learn the basis on which they are created. Moreover, in some headings the reverse structure is considered correct. For example, both the following extended headings are correct: 150 .. /a Polityka rolna /z Chiny and 151 .. /a Chiny /x polityka gospodarcza. Subject sub-

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<sup>15</sup> Geographical descriptors have a different structure in NLPD; for the sake of clarity - to show the transformation - we use the old form from SHL NLP in this paper.

heading 180 .. /x *polityka gospodarcza* is used after topics expressed in a geographical name, but after topic 150 .. /a *Polityka gospodarcza* is it not permitted to use a geographical subheading. In the case of topic 150 .. /a *Polityka rolna* the situation is reversed: it is permitted to use a geographical subheading, while the subject subheading 180 .. /x *polityka rolna* does not exist. There is no rational justification for the co-existence of these two syntactic structures. Similar solutions are found in RAMEAU: 150 .. /a *Politique agricole* /z *Pays de l'Union européenne*; 151 .. /a *Pays de l'Union européenne* /x *Politique économique*<sup>16</sup>; and also in LCSH:<sup>17</sup> 150.. /a *Agriculture and state* /z *European Economic Community countries*, 151 .. /a *European Economic Community countries* /x *Economic policy*.<sup>18</sup>

In the case of the two SHL KABA headings described above, the subjects of the documents are “economic policy” and “agricultural policy”, and the location is China. Dividing the extended headings into descriptors resolves this problem – if, of course, the role of the different elements of the extended heading is first properly understood.

The examples above show that the subject of the document may also be expressed in the subject subheading. Both the subject heading languages analysed in this paper contain a group of extended headings that begin with a geographical name in the topic of the heading, which, post-transformation, does not indicate the location of the subject but rather the subject itself. It is not possible to transform this group of extended headings correctly into post-coordinated form without modifying the working form.

For example, the SHL KABA subheading 180 .. /x *stosunki zagraniczne* is used after geographical names for works on the diplomatic relations of one country or region with another country or region,

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<sup>16</sup> For the sake of clarity, examples from RAMEAU are shown in MARC 21 format. The Bibliothèque nationale de France (BnF) uses the INTERMARC as its working format.

<sup>17</sup> Library of Congress Subject Headings – the language used for subject headings in the library catalogues in the United States and the model for RAMEAU.

<sup>18</sup> Examples from the catalogue databases of the BnF and Library of Congress.

the latter appearing as a geographical subheading within the same heading: *151 .. /a Polska /x stosunki zagraniczne /z Niemcy*. The two geographical names in the heading do not indicate the location but rather the subject, that is to say, the relations between the two (see *Relation between subjects*, p. 53). The geographical names in the SHL NLP extended heading SHL NLP *151 .. /a Niemcy /x a Polska* play a similar role.

The reasons for this problem can be found in imperfections in how the data is recorded in MARC format. In its plans to do away with the syntax of RAMEAU and transform it into a post-coordinated language, the BnF intends to make changes to the working format such that recording a geographical name as the subject is possible.<sup>19</sup>

A further example of incorrect recording of data in MARC format is SHL KABA extended headings with the subject subheading *180 .. /x kolonie*. In the extended heading *151 .. /a Portugalia /x kolonie /z Afryka*, the heading used as topic does not indicate the location but rather the owner of colonies that are located in Africa (the geographical subheading fulfilling its correct function). To transform this type of heading into post-coordinated language it would be necessary to create the subject descriptor *150 .. /a Kolonie portugalskie* and the geographical descriptor *151 .. /a Afryka*.

Another interesting example is SHL KABA extended headings with the subject subheading *180 .. /x badania*. In the heading *151.. /a Polska /x badania /z Czechy*, the geographical name “Polska” (“Poland”) is used as the subject of the research; the place of the research – that is, the location of the subject – is indicated by the second geographical name, used as a subheading.

A similar problem occurs in SHL NLP with the heading *151 .. /a Kraków (woj. małopolskie) /x godła*, in which the geographical name used as a topic does not indicate the location but rather the politi-

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19 *Rapport du Groupe de travail national sur la syntaxe de Rameau. Préconisations et pistes d'évolution* - [https://rameau.bnf.fr/sites/default/files/chantier\\_syntaxe/pdf/rapport\\_final\\_syntaxe\\_rameau.pdf](https://rameau.bnf.fr/sites/default/files/chantier_syntaxe/pdf/rapport_final_syntaxe_rameau.pdf) [accessed 14.12.2019].

cal/administrative entity. It is not possible to transform this construction into the subject descriptor *150 .. /a Godło i 151 .. /a Kraków (woj. małopolskie)*. A better solution would be to create the subject descriptor *150 .. /a Godło miasta Krakowa*.

We may summarise this as follows. If, in an extended heading whose topic is a geographical name, there exists a relationship of dependency between that name and the element that follows it (the subject subheading), it is not possible to transform the topic expressed in the geographical name into a geographical descriptor. However, if the relationship is one of location, where the geographical name indicates the location of the element that follows it, it is indeed possible to transform it into a geographical descriptor.

#### SUBJECT EXPRESSED IN A SUBHEADING

In Łysakowski's theory, the topic should express the subject of the document while the subheadings play a secondary role, expressing "aspects, facets, properties and certain circumstances relating to the subject".<sup>20</sup> This concept is based on card catalogues, where the most important element in terms of meaning needs to be in the initial position and items following the topic are less relevant for the purpose of searches.

In computer catalogues this order is not so important, although in the structure of a catalogue where headings are presented in index form, the place in the index is determined by the first element of the extended heading. The increasing search capabilities of the systems supporting library catalogues has enabled – or rather forced – a gradual departure from Łysakowski's original principle. But the principle itself gives rise to doubts in some cases, such as the role of individual subheadings in the subject heading. In SHL KABA methodology, too, it is possible to find subheadings which express the subject of the document (see *Subject expressed in an individual subheading*, p. 17).

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20 J. Sadowska, *Hasła przedmiotowe w teorii Adama Łysakowskiego...*, p. 139.

## SUBJECT EXPRESSED IN AN INDIVIDUAL SUBHEADING

In SHL KABA, headings with an individual subheading expressing, according to Łysakowski, not the subject itself but the properties of the subject<sup>21</sup> are described (using the example of the names of buildings in a city) as “fixed (inseparable) constructions” in which “the subheading contains the proper name of the building - the subject of the information that is mapped”.<sup>22</sup>

According to Łysakowski, individual subheadings express “their properties (parts, products)” and “one could say that they themselves become the object of classification”. He adds that “they belong to various larger subject groups; if those larger groups are not mentioned, the names of the details are incomplete, for which reason they must be content with the position of subheading”<sup>23</sup>. Here, researchers also talk about a “dependent” or “affiliated subject” (Polish: *przedmiot przynależny*) expressed in the individual or general subheading. Much has been written about the issue of affiliated subjects,<sup>24</sup> most authors concluding that distinguishing between main subjects and affiliated subjects becomes less important as the subject heading language develops:

The main vs. affiliated opposition is becoming increasingly theoretical and is often ignored in processes for analysing and indexing documents. [...] Today, subject heading languages have partially replaced developing subheadings expressing the properties of subjects with developing a stock of multi-word topics representing affiliated subjects. This shift appears to be justified by practical considerations regarding searching for information in the catalogue.<sup>25</sup>

21 A. Łysakowski, *Katalog przedmiotowy...*, pp. 35-39.

22 *Kartoteka wzorcową języka KABA: praca zbiorowa*, Part 1, *Nazwy własne*, ed. J. Woźniak, Warszawa 1994, p. 100.

23 A. Łysakowski, *Katalog przedmiotowy...*, pp. 106-107.

24 J. Sadowska, *Język hasel przedmiotowych Biblioteki Narodowej. Studium analityczno-porównawcze*, Warszawa 2003, pp. 172-174; J. Woźniak-Kasperek, *Wiedza i język informacyjny w paradygmacie sieciowym*, Warszawa 2011, p. 90.

25 J. Woźniak-Kasperek, *Wiedza i język informacyjny w paradygmacie sieciowym...*, p. 92.

Examples of constructions with an individual subheading:

SHL KABA: 110 2. /a Biblioteka Uniwersytecka w Warszawie. /b Gabinet Rycin

SHL NLP: 151 .. /a Toruń (woj. kujawsko-pomorskie) /x Kościół św. św. Piotra i Pawła

SHL KABA: 100 1. /a Mickiewicz, Adam /d (1798-1855). /t Dziady

In the examples above, according to Jadwiga Sadowska:

[...] it is obvious that the topic does not correspond to the subject in question. The subject is expressed in the subheading but in order to identify it fully you also need the topic that precedes it, and only the full heading allows you to identify the subject.<sup>26</sup>

SHL KABA methodology uses an interesting term, proposed by Jadwiga Woźniak-Kasperek, for describing a heading comprising a topic and an individual subheading, namely a “topic with a preposition” (“temat z prepozycją”).<sup>27</sup> Woźniak-Kasperek states that “the preposition forms an integral, inviolable part of the topic”.<sup>28</sup> The term she proposes suggests a change in the role of the subheading. According to Łysakowski, the subheading expresses the properties of the subject expressed in the topic. In the term “topic with a preposition” it becomes the basic element, preceded by a “preposition” that “in a certain way announces or introduces the topic proper”.<sup>29</sup>

The next stage in the development of the structure in question is the tendency, seen in various subject heading languages, to shorten the structure and leave only the second term (what was previously the “subheading”) or change the order of elements in the established heading. Also worth noting is the change in the type of established heading in cases where the two terms are not compat-

26 J. Sadowska, *Język hasiel przedmiotowych Biblioteki Narodowej...*, p. 172.

27 Kartoteka wzorcowa języka KABA..., p. 39; J. Woźniak-Kasperek, *Redakcja językowa hasiel KABA*, in: *Materiały z konferencji „Język hasiel przedmiotowych KABA. Stan obecny i perspektywy rozwoju”, Sopot, 9–11.09.1997*, Warszawa 1998, pp. 32–33.

28 J. Woźniak-Kasperek, *Redakcja językowa hasiel KABA*, w: *Materiały z konferencji „Język hasiel przedmiotowych KABA...*, pp. 32–33.

29 Kartoteka wzorcowa języka KABA..., p. 39.

ible in this respect; ultimately it is the type of the second element that remains (see Table 1).

**TABLE 1. CHANGE OF STRUCTURE OF ESTABLISHED COMPOSITE HEADING AND CHANGE OF TYPE OF HEADING (IN BOLD)**

	ISL	Before	After
Name of building in city	SHL KABA	151 ..  a Lublin (Polska)  x Bernardyńska (ulica)	150 ..  a Ulica Bernardyńska (Lublin, Polska)
	SHL NLP → NLPD	151 ..  a Toruń (woj. kujawsko-pomorskie)  x Kościół św. św. Piotra i Pawła	150 ..  a Kościół św. św. Piotra i Pawła (Toruń)
Name of collective body with hierarchical structure	SHL NLP → NLPD	110 2.  a Biblioteka Uniwersytecka w Warszawie.  b Gabinet Rycin	110 2.  a Gabinet Rycin (Biblioteka Uniwersytecka ; Warszawa)
Events with dates after geographical topics	RAMEAU	151 ..  a Lisbonne (Portugal)  y 1755 (Séisme)30	150 ..  a Séisme de Lisbonne (1755)
Titles of works after person topics	LCSH → FAST	100 1.  a Mickiewicz, Adam,  d 1798-1855.  t Dziady	130 .0  a Dziady (Mickiewicz, Adam)
Name of body in collective territorial body	SHL NLP → NLPD	110 1.  a Polska  b Ministerstwo Finansów	110 2.  a Ministerstwo Finansów (Polska)

The evolutionary tendency seen in headings which consist of a topic and an individual subheading (or “topic with a preposition”) is for the subject to be expressed in the second element – the sub-heading or the second part of the established heading. The topic is an additional element – a necessary one, but one whose role is to clarify the subject by:

- locating it in physical space: a building (*Kościół św. św. Piotra i Pawła*) located in a specific area (*Toruń*), or an area (*Ulica Bernardyńska*) located within a larger area (*Lublin (Polska)*)
- indicating the author of the work: a work (*Dziady*) by a specific author (*Mickiewicz, Adam (1798-1855)*)
- positioning it within a hierarchy: an institution (*Gabinet Rycin*) subordinate to another institution (*Biblioteka Uniwersytecka w Warszawie*), or an organ of a collective territorial body (*Ministerstwo finansów*) appointed and managed by a collective territorial body (*Polska*)

30 In RAMEAU, records are created in INTERMARC format; for the sake of clarity, we show them here in MARC 21 format.

This tendency to change the structure of the above group of established headings is gradual and varies between languages and groups of headings.<sup>31</sup> A comparison of the established headings (and descriptors) for one type of designator reveals differences even within one system (see Table 2).

**TABLE 2. COMPARISON OF ESTABLISHED HEADINGS/DESCRIPTORS FOR MANUSCRIPTS<sup>32</sup>**

ISL	Designator - manuscript as object	Designator - work contained in manuscript
SHL KABA	110 2.  a Biblioteka Narodowa (Warszawa).  k Rękopis.  n Ms. 8002	130 .0  a Psalterz floriański
NLPD	150 ..  a Psalterz floriański 410 2.  a Biblioteka Narodowa  x Rps 8002 III	130 .0  a Psalterz floriański
RAMEAU	110 2.  a Biblioteka narodowa (Pologne)  x Manuscrit. Ms. 8002	--
LCSH	130 .0  a Psalterz Floriański 410 2.  a Biblioteka Narodowa (Poland).  t Psalterz Floriański	110 2.  a Catholic Church.  t Psalter (Ms. St. Florian)

### SUBJECT EXPRESSED IN A GENERAL SUBHEADING

Besides individual subheadings expressing the subject of the document, which are found in all the pre-coordinated languages discussed here, there exist other structures for extended headings in which the role of expressing the subject of the document is shifted from the topic to the subheading.

In Łysakowski's theory, the "general" subject subheading serves to express the properties of the subject,<sup>33</sup> and the subject itself is expressed in the topic.<sup>34</sup> The list of subheadings in SHL NLP was originally limited; however, over time, as new editions of the

31 J. Sadowska, *Język hasał przedmiotowych Biblioteki Narodowej...*, p. 173.

32 I have chosen the distinction in SHL KABA as a basis for this comparison: "For works on the topic of the manuscript (manuscript book) of an anonymous work held in a certain library (museum, archive), one uses for cataloguing purposes an established subject heading of the type: [name of library, archive, museum] - manuscripts. [no.]. If the text of the manuscript is of interest to specialists in various disciplines (historians, linguistics, etc.) and has been published, one creates a second heading for the title of the unified manuscript" (T. Głowacka, *Katalogowanie przedmiotowe...*, p. 59). This distinction is in line with the idea of a conceptual modelling structure but does not reflect the spirit of Lysakowski's theory.

33 A. Łysakowski, *Katalog przedmiotowy...*, pp. 35–39.

34 Ibidem, p. 58.

*Słownik JHP BN* (*Printed edition of the authority file of SHL NLP*) appeared, this list grew.<sup>35</sup> A second tendency that can be observed is the shift away from the “topic – general subheading” structure towards multi-word topics.<sup>36</sup> This tendency indicates that the precise distinguishing of subjects from their properties is becoming less important.<sup>37</sup> Sadowska believes that this second tendency, observable in SHL NLP since the mid-1990s, shows that “the essence of subject heading languages – the expression of subjects in topics, and their approaches and aspects in subheadings – is becoming blurred”.<sup>38</sup> Przemysław Ćwikowski does not view this tendency as negative: “in the ongoing changes I do see not so much the destruction of the concept of the “subject” as a return to the original, epistemological understanding of the concept”.<sup>39</sup> In the remainder of this article we focus solely on manifestations of this tendency and the need to properly recognise the nature of the different elements occurring in complex structures in order to steer their further decomposition as a basis for post-coordination.

The persistence of complex structures can be explained by the fact that they fall into regular patterns with which librarians are familiar, and are convenient for cataloguing purposes. However, the moment we attempt to transform pre-coordinated language into post-coordinated form, the question of what the individual elements in the extended heading express becomes crucial. As we shall see, in most of the cases discussed below, the answer to this question is far from simple.

Examples of subject headings where the subject of the document is the “teaching or study” of a specific issue:

LCSH: 150 .. /a Education /x Study and teaching

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35 J. Sadowska, *Hasła przedmiotowe w teorii Adama Łysakowskiego...* pp. 140–144.

36 Ibidem, pp. 76, 80; J. Woźniak-Kasperek, *Wiedza i język informacyjny w paradymacie sieciowym...*, p. 91.

37 Ibidem, p. 91.

38 J. Sadowska, *Język hasel przedmiotowych Biblioteki Narodowej...*, pp. 181, 188.

39 P. Ćwikowski, *Język hasel przedmiotowych KABA wobec teorii Adama Łysakowskiego. Koncepcje wyszczególniania przedmiotu*, Wrocław 2005, p. 13 – [http://open.ebib.pl/ojs/index.php/wydawnictwa\\_zwartre/article/view/142/273](http://open.ebib.pl/ojs/index.php/wydawnictwa_zwartre/article/view/142/273) [accessed 14.12.2019].

RAMEAU: 150 .. /a *Français (langue)* /x *Étude et enseignement* /z *Sénégal*

SHL KABA: 150 .. /a *Aktorstwo* /x *studia i nauczanie (akademickie)* /z *Polska* /y 1990-

Examples of subject headings where the subject of the document is the “reception” of a specific issue:

LCSH: 150 .. /a *Instrumental music* /z *Italy* /y 17<sup>th</sup> century /x *Analysis, appreciation*

RAMEAU: 150 .. /a *Littérature autrichienne* /x *Appréciation* /z *Belgique* /z *Flandre (Belgique)* /y 1945-1990

SHL KABA: 150 .. /a *Literatura rosyjska* /y 1870-1914 /x *recepja* /z *Francja*

Examples of subject headings where the subject of the document is “public opinion” on a specific issue:

LCSH: 150 .. /a *Arab-Israeli conflict* /y 1973-1993 /x *Public opinion*

RAMEAU: 151 .. /a *États-Unis* /x *Relations extérieures* /y 1989-... /x *Opinion publique*

SHL KABA: 150 .. /a *Aborcja* /z *Polska* /y 1990- /x *public opinion*

The headings above are extended subject headings in which the subject of the document is expressed in the subject subheading, while the element preceding the subheading supplements it; in other words, the “subject of the subject” is expressed in the subheading. For example, if the subject of the document in one of the examples above is “public opinion”, then the subject of that public opinion is “abortion”. The subject of the document – “public opinion” – is not described in the subject heading in terms of its location in time or space. This may be expressed in a second heading:

150 .. /a *Aborcja* /z *Polska* /y 1990- /x *public opinion*

150 .. /a *Public opinion* /z *Polska* /y 1990-

In the example above, “public opinion” is indicated as the subject of the document by the second, supplementary subject heading.

After some subject subheadings of this type in SHL KABA, RAMEAU and LCSH, it is possible to use geographical and chronological subheadings. In this case, the principle is that one geo-

graphical subheading and one chronological subheading may be used in each extended subject heading:

150 .. /a Dramat niemiecki /x recepcja /z Polska /y 18 w.

150 .. /a Dramat niemiecki /y 18 w. /x historia i krytyka

In the above example, unlike the example for “public opinion”, “eighteenth-century German drama” is indicated as the subject of the document by the second subject heading. In fact, the actual subject of the document is its reception, but because it is not possible to have two chronological subheadings in the first subject heading, “German drama” is not defined from a chronological perspective.

A similar principle exists in SHL NLP regarding the impossibility of having a chronological subheading after the subheading 180 .. /x recepcja, and the fact that in SHL NLP it is not possible to change the position of a chronological subheading:

155 .. /a Poezja polska /x recepcja /z Hiszpania

150 .. /a Poezja polska /x historia /y 1980-1989 r.

Another example found in both the subject heading languages analysed here is the subheading 180 .. /x konstytucja used after geographical names. The subject of the document is expressed in the subject subheading:

SHL NLP: 151 .. /a Polska /x konstytucja 1997 r.

SHL KABA: 151 .. /a Polska /x konstytucja (1997)

The way to transform this type of extended heading is shown in the section on extended headings where the initial element is a geographical name (see *Subject expressed in the topic of the heading*, p. 10).

In SHL KABA it is possible to have more than one subject subheading in an extended heading. This combination of subheadings may also express the subject of a document:

100 1. /a Mazowiecki, Tadeusz /d (1927-2013) /x kariera /x polityka

150 .. /a Samochody /x silniki /x thumiki

In the examples above, the subject subheading (or combination of subject subheadings) expresses the subject of the document, and the topic becomes an integral part of it. We can check the correctness of the naming of the subject in such constructions by

reading the elements expressing the subject in reverse order, that is, starting from the end. For example, in the heading SHL NLP 155 .. /a *Poezja polska /x recepcja /z Hiszpania*, the subject is the reception of Polish poetry, while in the heading SHL KABA 150 .. /a *Samochody /x silniki /x tłumiki*, the subject is silencers for the engines of cars.

A special type of construction where the subject is expressed in the subject subheading is subject headings whose initial element is the name of a type or genre of literature, a type of film, or a type or form of music, and so on, used as the subject heading:

SHL NLP: 155 .. /a *Powieść polska /x język /y 20 w.*

SHL NLP: 155 .. /a *Sonata (altówka i fortepian) /x historia /y 20 w.*

SHL NLP: 155 .. /a *Film amatorski polski /x historia /y 1939-1945 r.*

SHL KABA: 150 .. /a *Powieść historyczna amerykańska /y 19 w. /x tematy motywów*

SHL KABA: 150 .. /a *Muzyka na fortepian /y 1900-1945 /x historia i krytyka*

SHL KABA: 150 .. /a *Filmy biograficzne /x historia i krytyka*

In these examples the subject subheadings - 180 .. /x *historia* in SHL NLP and 180 .. /x *historia i krytyka* in SHL KABA - simply indicate that the remaining elements in the heading express the subject of the document. The semantic value of subheadings can be misleading, however, and the document may actually be about the history of the elements expressed in the first part of the heading, for example. A similar role within the subject heading is played by the SHL KABA subheading 180 .. /x *krytyka i interpretacja*, used after the names of people for works on the topic of the creative output of writers, for example 100 1. /a *Norwid, Cyprian Kamil /d (1821-1883) /x krytyka i interpretacja*.

One more option exists for expressing the subject in the general subject subheading, found in both the subject heading languages analysed here, although with a different methodological basis in each case. This is the use of a heading consisting of a topic and a general subject subheading rather than a more specific heading. In the NUKAT catalogue, the following headings are used to classify the publication "U Olgi Boznańskiej: oblicza pracowni artystki":

100 1. */a Boznańska, Olga /d (1865-1940) /x rezydencje i miejsca pobytu  
150 .. /a Pracownie artystów /y 1870-1914*

Both of these headings are too broad. In the first heading, the subheading *180 .. /x rezydencje i miejsca pobytu* used after the personal name expresses the concept more broadly than the actual subject of the document, which should be the name of Olga Boznańska's workshop.

Headings with a similar structure and use can be found in the way subject classification is carried out in practice in SHL NLP. For example, the following heading is used to describe the publication "Wstęp do projektowania konstrukcji kadłubów okrętów":

150 .. */a Statki /x projekty /v podręcznik<sup>40</sup>*

The above example reveals a tendency towards generalisation in SHL NLP methodology. In SHL KABA, the replacement of a detailed heading with a heading in which the general subheading expresses a concept broader than the actual subject of the document is probably the result of the author of the subject-heading description lacking the authorisation to create a new established heading. In both subject heading languages, in the examples above, the subject of the document is not expressed directly but rather implied (see *Implied subject*, p. 25), which does not make searches easier.

### IMPLIED SUBJECT

In pre-coordinated subject heading languages, cases occur where the subject is implied in the subject heading. In other words, it is not expressed directly in any element of the subject heading.

The following are examples of extended subject headings in SHL KABA where the subject of the document is implied:

100 1. */a Dickens, Charles /d (1812-1870) /x fabuły, intrygi*

- here, the subject of the publication is themes, plots and events depicted in the work of Charles Dickens, not the person of Dickens himself

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40 J. Sadowska, *Hasła przedmiotowe w teorii Adama Łysakowskiego...*, p. 67.

100 1. /a Kafka, Franz /d (1883-1924) /x krytyka i interpretacja

- here, the subject of criticism and interpretation is the creative work of Frank Kafka, not the person of Kafka himself

150 .. /a Śmierć /x w literaturze

- here, the subject of the publication is not death but rather how it is presented in literature.

For comparison, here is an extended subject heading in SHL KABA with the same structure, expressing the subject directly:

100 1. /a Dickens, Charles /d (1812-1870) /x myśl polityczna i społeczna

- here, the subject of the publication is the political and social philosophy of Charles Dickens.

Constructions with an implied subject are also found in SHL NLP, for example:

100 1. /a Kafka, Franz /d (1883-1924) /x recepcja

- here, the subject of the publication is the creative work of Franz Kafka, not the person of Kafka himself

100 1. /a Proust, Marcel /d (1871-1922) /x w literaturze polskiej

100 1. /a Corot, Camille /d (1796-1875) /x w literaturze polskiej

- these headings are used to describe the publication “Proust i Corot w eseistyce Józefa Czapskiego”, the subject of which is the writing of Proust and the paintings of Corot, not the individuals whose names appear as the topic in the subject headings.

A special case of implied subjects is syntactic structures consisting of a topic and a subject subheading, where the syntactic scope is broader than the subject of the document in question. Such structures are found in both subject heading languages. In Łysakowski's theory, these structures are referred to as “reductions”, but this is not a typical case of reduction as a methodological solution. This type of reduction could be called “syntactical reduction”.<sup>41</sup>

Łysakowski's suggestion of reduction as a methodological solution, which he says should be used in exceptional circumstances

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<sup>41</sup> The distinction between “syntactic reduction” and “semantic reduction” is mine, used here for the sake of the argument.

only,<sup>42</sup> consists of replacing an adequate heading with a different heading, most often a more general one (although this was not the idea behind Łysakowski's proposal) or a related one, which meets the linguistic requirements better (for example, it contains the correct Polish name).<sup>43</sup>

“Reductive” phenomena occur in both the subject heading languages analysed here. They fall into two main types: semantic reduction and syntactic reduction. Syntactic reduction consists of creating a more general extended heading which replaces the detailed heading specifying the subject of the document. This is formally similar to the “reversed” headings found in SHL NLP (see *Incomplete subject*, p. 28 and *Relationship between subjects*, p. 53), but has a different function in the classification of the document. Łysakowski's recommendation, simplifying somewhat, was semantic reduction; syntactic reduction appears to be a phenomenon that arose independently in the course of the language being used in practice.

Jadwiga Sadowska cites some relevant examples from “Przewodnik Bibliograficzny”,<sup>44</sup> such as the use of the heading “Biblistyka – protestantyzm – zagadnienia” instead of “Grzech” and “Zło”, or “Boże Narodzenie – zagadnienia” and “Kucharstwo” instead of “Potrawy wigilijne”. In these examples the subject is not expressed adequately; it is implied. According to Sadowska, such headings arose in order to avoid the physical dispersion of documents due to the use of excessively detailed headings.<sup>45</sup>

The creation of structures such as these, rather than adequately detailed headings, occurs fairly often in SHL KABA. The reason may lie in the method of creating established headings and the procedures that apply, which in some cases take too much time and work. Examples of headings of this type, created using sub-

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42 A. Łysakowski, *Katalog przedmiotowy...*, p. 68.

43 Ibidem, p. 85.

44 J. Sadowska, *Hasła przedmiotowe w teorii Adama Łysakowskiego...*, p. 68.

45 Ibidem, p. 67.

ject subheadings, include 180 .. /x pomniki, 180 .. /x rezydencje i miejsca pobytu, 180 .. /x biblioteki, 180 .. /x budynki, 180 .. /x chóry and similar. They are used as substitutes and generally have a broader semantic scope than is necessary for classifying the document. These headings represent a significant problem for searches; although they are created correctly, in line with the methodology, in other cases they can prove inadequate.

### INCOMPLETE SUBJECT

In both the subject heading languages analysed here, there are several methodological solutions where the subject heading does not express the full subject but only part of its semantic scope. In such cases it is recommended to supplement the expression of the subject with an additional subject heading.

The most common reason for using an additional heading to supplement the expression of the subject is the rule prohibiting the use of additional subheadings after subheadings expressing the subject. This is also most often the case with headings where the subject is expressed in a general subheading (see *Subject expressed in a general subheading*, p. 20).

Examples of SHL KABA subheadings which require the creation of an additional heading in practice, if such a heading arises from an analysis of the contents of the document to be classified, include the following:

180 .. /x w literaturze + 180 .. /x tematy, motyw<sup>46</sup>:

150 .. /a Kobiety /x w literaturze

150 .. /a Poezja polska /y 20 w. /x tematy, motyw

180 .. /x w sztuce (kinie, muzyce, operze) + 180 .. /x tematy, motyw:

150 .. /a Aniołowie /x w sztuce

150 .. /a Malarstwo renesansowe /z Włochy /x tematy, motyw

Examples of SHL NLP subheadings which require the creation of an additional heading in practice, if such a heading arises from an

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46 A. Bober, D. Patkaniowska, *Katalogowanie w języku haseł przedmiotowych KABA*, Part 2, *Opis przedmiotowy dokumentów z dziedziny literatury*, Warszawa 2005, p. 18.

analysis of the contents of the document to be classified, include the following:

180 .. /x w literaturze [...] + 180 .. /x tematyka<sup>47</sup>:

150 .. /a Kobieta /x w literaturze polskiej

155 .. /a Poezja polska /x tematyka /y 19-20 w.

In SHL NLP the order of the elements in an extended subject heading cannot change, which leads to a risk of ambiguity.<sup>48</sup> For this reason, to avoid having to change the order of the elements in this language, it is recommended to use the following headings:

150 .. /a Przekłady polskie /x historia /y 20 w.

150 .. /a Powieść irlandzka /x historia /y 19 w.

150 .. /a Powieść irlandzka /x przekłady polskie.<sup>49</sup>

The same reason lies behind the prohibition on the use of chronological and geographical subheadings after certain subheadings in SHL KABA which require further definition in order for the subject of the document to be expressed fully. However, this is a “quantitative” solution: it is not permitted to use more than one chronological and one geographical subheading in each extended SHL KABA heading:<sup>50</sup>

150 .. /a Aborcja /z Polska /y 1990- /x public opinion

150 .. /a Public opinion /z Polska /y 1990-

The restriction in SHL NLP that only geographical subheadings that are the names of countries or areas larger than a country can be used, makes it necessary to use a second, supplementary subject heading:

155 .. /a Muzyka /x historia /z Włochy

151 .. /a Florencja (Włochy) /x kultura.<sup>51</sup>

Because these subject headings express an incomplete subject and require supplementation with a second subject heading, they

47 *Poradnik JHP BN*, Part 7, p. 36.

48 B. Włodarczyk, J. Woźniak-Kasperek, *Język Hasel Przedmiotowych Biblioteki Narodowej – od analizy dokumentu do opisu przedmiotowego*, Warszawa 2017, pp. 130–131.

49 Ibidem, p. 131.

50 T. Główacka, *Katalogowanie przedmiotowe...*, pp. 40, 53.

51 J. Sadowska, *Język hasel przedmiotowych Biblioteki Narodowej...*, p. 138.

can be used more often, combined with other headings, and are therefore more universal. This methodological solution represents an important step towards post-coordination.

A methodological solution with analogous effect is the elimination of formal subheadings in SHL NLP, carried out in 2010–2012.<sup>52</sup> The expression of a document's contents in a formal topic and not a formal subheading, as was previously the case, supplements the description of the document's contents. For example, for the publication entitled “*Kolizje: antologia nowego dramatu węgierskiego*”, SHL NLP uses the headings:

155 .. /a *Dramat węgierski* /y 21 w.

155 .. /a *Antologie*

A special use of supplementary headings to express the subject of a publication is found in the principle of “reversing” topics, which involves adding a broader, more generalising heading. The detailed (adequate) heading is accompanied by the generalising heading in the description of the publication.

One of the basic characteristics of both SHL NLP and SHL KABA is their “detailing” approach to the classification of documents. In one of the earliest publications on the methodology of SHL KABA, we read as follows:

This [...] will be an information and search language [...] whose semantic scope is determined by the subject matter of the collections in the Libraries and how that subject matter is segmented, which will make it possible to use a detailing rather than a generalising approach to subject headings.<sup>53</sup>

In the case of SHL NLP, the methodological declaration on its “detailing” approach to classifying documents, understood to mean “giving the publications to be described headings that are adequate with regard to their contents”,<sup>54</sup> is accompanied by a re-

52 B. Włodarczyk, J. Woźniak-Kasperek, *Język Hasel Przedmiotowych Biblioteki Narodowej...*, p. 114.

53 *Kartoteka wzorcowa języka KABA...*, p. 14.

54 Biblioteka Narodowa. Fabryka Języka. Blog by the Pracownia Języka Hasel Przedmiotowych BN – <http://fabryka-jazyka.bn.org.pl/?p=1255> [accessed 14.06.2019].

mark on the possibility of adding headings with a broader scope in order to indicate the “context, domain, membership of a certain group or category (known as the principle of “reversing” topics).<sup>55</sup> *Poradnik BN* gives the following example of the use of this “reversing” principle: a biography of Johann Sebastian Bach under the personal heading 100 1. *la Bach, Johann Sebastian /d* (1685-1750) has the heading 150 .. *la Kompozytorzy niemieccy /y 18 w.* added to it, which groups together “all materials on German composers of this period in the library catalogue”.<sup>56</sup> At the same time, the prohibition on adding headings “which are connected by a hierarchical or associative relationship in the authority file”<sup>57</sup> to the description of the publication suggests that the principle of “reversing” has the same function as the semantic relations recorded in the authority file record of the established heading. The use of two different methods interchangeably to achieve the same effect would not appear to make users’ searches for documents easier.

This “reversing” of headings in the manner observed in practice in subject cataloguing in SHL NLP does not come directly from Łysakowski. According to Jadwiga Sadowska, the practice of adding generalising headings by “reversing” appeared in the mid-1980s as a result of an incorrect interpretation of the principle of multiple descriptions in cases where, next to the personal topic, Łysakowski recommends adding a “separate heading” for the topic accompanying the personal topic. For example, for the work *Napoleon a Polska*, Łysakowski recommends using a personal heading for Napoleon and a separate additional heading for Polish-French policy and the Polish Legions in 1797.<sup>58</sup>

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- Język Hasel Przedmiotowych Biblioteki Narodowej: poradnik, Part 2: W. Klenczon, *Opracowanie przedmiotowe – podstawowe zasady*, p. 8 - <http://fabryka-języka.bn.org.pl/wp-content/uploads/2012/01/II.JHP-BN-opracowanie-przedmiotowe.10.01.pdf> [accessed 14.06.2019].

55 Ibidem, p. 8.

56 Ibidem, p. 8.

57 Ibidem, p. 9.

58 J. Sadowska, *Hasła przedmiotowe w teorii Adama Łysakowskiego...*, p. 154.

An example of “reversing” in SHL NLP<sup>59</sup>:

245 10 /a Słowacki :/b opowieść biograficzna / /c Zbigniew Sudolski.

600 14 /a Słowacki, Juliusz /d (1809-1849)

650 .4<sup>60</sup> /a Poeci polscy /y 19 w.

655 .4 /a Biografia

According to Jadwiga Woźniak-Kasperek, the principle of “reversing” headings leads to generalised headings, which create micro-classification clusters in the catalogue or index”.<sup>61</sup> Jolanta Hys, writing on the pragmatics of SHL NLP, explains that the purpose of this procedure is to increase “pragmatic relevance”. As an example she gives the heading “Kowalski, Jan - biografia”, which is supplemented by the heading “Stolarze - biografie - Polska - 19 w.” The supplementary heading, which is a “reversing” heading, indicates important features of the subject which are absent from the heading “Kowalski, Jan - biografia” - namely his profession and when and where he lived.<sup>62</sup> It is this form of clarification that justifies the use of “reversing” headings supplementing the description of the subject matter of the document.

When examining the evolution of subject heading languages, it is very important to identify and evaluate methodological phenomena. Some of these phenomena - such as the principle of “reversing” headings described above, practised for years by the National Library of Poland - require verification to see whether they agree with the methodology of the new language NLPD, created out of the transformation of SHL NLP.

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59 Example from the catalogue database of the National Library of Poland, selected on 18.12.2017.

60 The second indicator “4” was used in the library of the National Library of Poland until mid-December 2018 for SHL NLP/NLPD headings. In the present article it occurs solely in examples of bibliographical descriptions.

61 B. Włodarczyk, J. Woźniak-Kasperek, *Język Hasel Przedmiotowych Biblioteki Narodowej...*, p. 22.

62 J. Hys, *Pragmatyka Języka Hasel Przedmiotowych Biblioteki Narodowej (JHP BN) i Uniwersalnej Klasyfikacji Dziesiętnej (UKD) w „Przewodniku Bibliograficznym”*, Warszawa 2009, p. 6.

### ASPECT OF THE SUBJECT

In his analysis, Łysakowski differentiates between the subject of a document and its “aspect” (Polish: *ujęcie*). When describing the contents and scope of a document, he pays particular attention to the choice of its main feature. “Outside the book, the scope corresponds [...] to an individual subject or set of subjects [...].”<sup>63</sup> The expression of the subject/subjects of the document using “topics” reflects the scope of the document. In the subject (“thematic”)<sup>64</sup> catalogue, this is the main feature.

In the concept of the subject catalogue, the aspect of the subject is a secondary feature (or “secondary descriptive category”).<sup>65</sup> Łysakowski defines “aspect” as the “contents of the work”, comprising the “thoughts (judgements and representations) of the author on or about a given subject (on a given topic, in a given scope) from a specific point of view”.<sup>66</sup> Łysakowski continues that aspect is to be indicated by general class subheadings, expressed in the names of domains of knowledge and cultural and economic life. They are to be used “where the subject is discussed from the perspective of this domain”.<sup>67</sup>

Łysakowski’s concept was reflected faithfully in the methodology of SHL NLP. Subject subheadings (general, content-related), which are the names of domains such as *psychology*, *ethics*, *philosophy* and so on, were used to express aspect.<sup>68</sup>

We find a similar idea in the methodology of SHL KABA:

In the process of subject cataloguing, the aspect of the subject is a secondary descriptive category. In the subject heading (headings) assigned to the document in question, aspect generally receives the status of a subheading.<sup>69</sup>

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63 A. Łysakowski, *Katalog przedmiotowy*, Part 1, *Teoria*, ed. 2, Warszawa 2002, p. 41.

64 Ibidem, p. 43.

65 Ibidem, p. 40.

66 Ibidem, p. 43.

67 J. Sadowska, *Hasła przedmiotowe w teorii Adama Łysakowskiego...*, p. 140.

68 *Poradnik...*, Part 1, p. 5.

69 T. Główacka, *Katalogowanie przedmiotowe...*, p. 31.

In SHL KABA, aspect is expressed differently. Following the pattern of LCSH (and RAMEAU), aspect in SHL KABA is expressed by means of subheadings with the structure “aspect [adjective created from the name of the domain]”, for example: 180 .. /x *aspekt medyczny*, 180 .. /x *aspekt ekonomiczny*. In languages that are compatible with SHL KABA, similarly constructed subheadings occur. However, in LCSH they have a different structure: the element expressing the domain comes in the initial position (see Table 3). According to Jadwiga Sadowska, putting the “semantically important word” first was a better solution for card catalogues, as with SHL NLP subheadings expressed in the simple name of the domain.<sup>70</sup> The structure of subheadings in SHL KABA, she argues, means that they are difficult for users to remember and, contrary to Łysakowski’s recommendations, “do not group related material together but actually disperse it”.<sup>71</sup> However, analysis of all the subheadings expressing aspect reveals that they do not all have the same structure. Some, as in SHL NLP, are the same as the name of the domain, for example subheadings 180 .. /x *filozofia*, 180 .. /x *historia*, 180 .. /x *sociologia*, 180 .. /x *prawo* (see also Tables 3 and 4). This diversity does not make the language easier to use.

For certain domains SHL KABA has more than one correct subheading (Table 4). Except for main subheadings expressing the domain aspect (as with subheadings 180 .. /x *filozofia*, 180 .. /x *historia* and 180 .. /x *prawo*), these subheadings, which are identical with the names of the domains, have a different, strictly defined scope of use. They may be used after certain headings specified in the notes on their use, in the function of topics from the scope of the domain in question. For example, in the domain of psychology, the main “aspect subheading” is subheading 180 .. /x *aspekt psychologiczny*. This may be used “after common names, with the exception of expressions with a psychological connotation, for works on the topic of the psychological impact of said subject”. An

<sup>70</sup> J. Sadowska, *Język hasiel przedmiotowych Biblioteki Narodowej...*, p. 125.

<sup>71</sup> Ibidem, p. 126.

TABLE 3. DOMAINS AND THEIR CORRESPONDING SUBHEADINGS IN SUBJECT HEADING LANGUAGES<sup>72</sup>

Domain	SHL NLP	SHL KABA	RAMEAU	LCSH
Anthropology	180 .. x antropologia	180 .. x aspekt antropologiczny	180 .. x Anthropologie	180 .. x Anthropological aspects
Economics	180 .. x gospodarka	180 .. x aspekt ekonomiczny	180 .. x Aspect économique	180 .. x Economic aspects
Ethics	180 .. x etyka	180 .. x sytuacja gospodarcza	180 .. x Conditions économiques	180 .. x Economic conditions
		180 .. x aspekt moralny	180 .. x Aspect moral	180 .. x Moral and ethical aspects
		180 .. x moralność	180 .. x Morale pratique	180 .. x Conduct of life
		180 .. x etyka	180 .. x Morale	180 .. x Ethics
		180 .. x sytuacja moralna	180 .. x Conditions morales	180 .. x Moral conditions
Philosophy	180 .. x filozofia	180 .. x filozofia	180 .. x Philosophie	180 .. x Philosophy
		180 .. x estetyka	180 .. x Estétique	180 .. x Aesthetics
		180 .. x logika	180 .. x Logique	180 .. x Logic
		180 .. x metafizyka	180 .. x Métaphysique	180 .. x Metaphysics
Physiology	180 .. x fizjologia	180 .. x aspekt fizjologiczny	180 .. x Aspect physiologique	180 .. x Physiological aspects
Genetics	180 .. x genetyka	180 .. x aspekt genetyczny	180 .. x Aspect génétique	180 .. x Genetic aspects
History	180 .. x historia	180 .. x genetyka	180 .. x Génétique	180 .. x Genetics
Medicine	180 .. x medycyna	180 .. x historia	180 .. x Histoire	180 .. x History
Political science	180 .. x polityka	180 .. x aspekt medyczny	180 .. x Aspect medical	180 .. x Medical aspects
		180 .. x aspekt zdrowotny	180 .. x Politique et gouvernement	180 .. x Political aspects
		180 .. x aspekt polityczny	180 .. x Activité politique	180 .. x Politics and government
		180 .. x działalność polityczna		180 .. x Political activity
Parapsychology	----	180 .. x aspekt parapsychiczny	180 .. x Aspect parapsychique	180 .. x Psychic aspects
Psychology	180 .. x psychologia	180 .. x aspekt psychologiczny	180 .. x Aspect psychologique	180 .. x Psychological aspects
Law	180 .. x prawo	180 .. x prawo	180 .. x Droit	180 .. x Law
Religion	180 .. x religia	180 .. x status prawnego	180 .. x Statut juridique	180 .. x Legal status, laws, etc.
Sociology	180 .. x sociologia	180 .. x religia	180 .. x Aspekt religijny	180 .. x Religious aspects
		180 .. x aspekt społeczny	180 .. x Religion	180 .. x Religion
		180 .. x sociologia	180 .. x Aspekt social	180 .. x Social aspects
			180 .. x Sociologie	180 .. x Sociology

72 Subheadings are capitalised here for RAMEAU and LCSH but not for SHL NLP and SHL KABA, following the methodology of each language.

additional subheading in this domain is subheading *180 .. /x psychologia*, which “is used after personal names, categories of people and ethnic groups, titles of holy books, names of living organisms and after the heading *Zwierzęta* for psychological studies on said topic”. Another example, subheading *180 .. /x aspekt religijny*, “is used after the names of wars and armed conflicts, and after common names, with the exception of headings with a religious connotation, for works presenting the topic in question in its religious aspect or with regard to religious practices associated with it”. However, subheading *180 .. /x religia* “is used after geographical names (regions of the world, countries, cities) for works about the situation of the religions adopted and practised there”.

**TABLE 4. EXAMPLES OF SHL KABA HEADINGS BELONGING TO PARTICULAR DOMAINS (WITH AN IMMANENT CONNOTATION), SUBHEADINGS GIVING THE CONNOTATION, AND SELECTED OTHER DOMAIN SUBHEADINGS**

Domain and subheadings giving a connotation (in bold), and other domain subheadings in SHL KABA	Established headings with an immanent connotation	Extended headings containing domain subheadings
<b>Anthropology:</b> <b>180 .. /x aspekt antropologiczny</b>	150 .. la Plemiona 150 ..  a Antropologia medyczna 450 ..  a Choroby /x antropologia 450 ..  a Choroby /x aspekt antropologiczny	150 ..  a Dotyk /x aspekt antropologiczny
<b>Economics:</b> <b>180 .. /x aspekt ekonomiczny</b> <b>180 .. /x sytuacja gospodarcza</b>	150 ..  a Zysk 150 ..  a Przemysł okrętowy 450 ..  a Budowa statku /x aspekt ekonomiczny 150 ..  a Histerea (ekonomia)	150 ..  a Antysemizm /x aspekt ekonomiczny 151 ..  a Afryka Południowa /x sytuacja gospodarcza
<b>Ethics:</b> <b>180 .. /x aspekt moralny</b> <b>180 .. /x moralność</b> <b>180 .. /x etyka</b> <b>180 .. /x sytuacja moralna</b>	150 ..  a Przebaczenie 150 ..  a Decyzyja (etyka) 150 ..  a Etyka biznesu 450 ..  a Biznes /x aspekt moralny	150 ..  a Ekonomia /x aspekt moralny 100 1.  a Rousseau, Jean Jacques  d (1712-1788) /x etyka 150 ..  a Alpinisiści /x moralność 151 ..  a Rosja /x sytuacja moralna
<b>Philosophy:</b> <b>180 .. /x filozofia</b> <b>180 .. /x estetyka</b> <b>180 .. /x logika</b> <b>180 .. /x metafizyka</b>	150 ..  a Epistemologia 150 ..  a Działanie (filozofia) 450 ..  a Filozofia działania 450 ..  a Działanie /x filozofia 150 ..  a Wojna /x filozofia 450 ..  a Filozofia wojny	150 ..  a Ból /x filozofia 100 1.  a Austen, Jane  d (1775-1817) /x filozofia 100 1.  a Balzac, Honoré de  d (1799-1850) /x estetyka 100 1.  a Milosz, Oskar Vladislav Lubicz de  d (1877-1939) /x metafizyka 100 1.  a Struve, Henryk  d (1840-1912) /x logika

Physiology:	150 ..  a Dojrzewanie płciowe 450 ..  a Dojrzewanie płciowe  x aspekt fizjologiczny	150 ..  a Emocje  x aspekt fizjologiczny 150 ..  a Histamina  x aspekt fizjologiczny 150 ..  a Dzieci  x fizjologia
Genetics:	150 ..  a Fizjologia człowieka 450 ..  a Człowiek  x fizjologia 150 ..  a Genetyka ewolucyjna 450 ..  a Gatunki (biologia)  x evolucja  x aspekt genetyczny 150 ..  a Komplementacja (genetyka) 150 ..  a Prawa Mendla 550 ..  w g  a Genetyka	150 ..  a Inteligencja  x aspekt genetyczny 150 ..  a Rośliny strączkowe  x genetyka
History:	150 ..  a Reformacja 151 ..  a Hiszpania  y 1936–1939 (Wojna domowa)	150 ..  a Urbanistyka  x historia 150 ..  a Ubóstwo  y 1990–[domyślne] 151 ..  a Nigeria  y 19 w. [domyślne]
Medicine:	150 ..  a Medycyna lotnicza 450 ..  a Lot  x aspekt medyczny 150 ..  a Grypa 150 ..  a Syndrom przesunięcia czasu 550 ..  w g  a Medycyna lotnicza	150 ..  a Podróże  x aspekt medyczny 150 ..  a Ogień  x aspekt zdrowotny
Political science:	150 ..  a Partie polityczne 150 ..  a Architektura i polityka 450 ..  a Architektura  x aspekt polityczny 150 ..  a Autorytaryzm 550 ..  w g  a Nauki polityczne	150 ..  a Aborcja  x aspekt polityczny 151 ..  a Polska  x polityka i rządy  y 17 w. 150 ..  a Katolicy  x działalność polityczna 150 ..  a Drzewa  x aspekt parapsychiczny
Parapsychology:	150 ..  a Kolor  x aspekt parapsychiczny 450 ..  a Kolor i parapsychologia 450 ..  a Kolory  x aspekt parapsychiczny	150 ..  a Alpinizm  x aspekt psychologiczny 100 0 ..  a Abel  c (postać biblijna)  x psychologia 100 1 ..  a Milne, Alan Alexander  d (1882–1956)  x i psychologia 100 0 ..  a Aristoteles  d (384–322 a.C.)  x wkład do psychologii 150 ..  a Handel elektroniczny  x prawo
Psychology:	150 ..  a Psychologia humanistyczna 150 ..  a Identyfikacja (psychologia) 150 ..  a Obraz ojca 550 ..  w g  a Psychologia	100 0 ..  a Abel  c (postać biblijna)  x psychologia 100 1 ..  a Milne, Alan Alexander  d (1882–1956)  x i psychologia 100 0 ..  a Aristoteles  d (384–322 a.C.)  x wkład do psychologii 150 ..  a Bezrobotni  x status prawnny
Law:	150 ..  a Prawo administracyjne 450 ..  a Administracja publiczna  x prawo 150 ..  a Zwierzęta  x prawo 450 ..  a Zwierzęta i prawo 150 ..  a Obowiązek alimentacyjny 450 ..  a Alimynt (prawo)	150 ..  a Alchemia  x aspekt religijny 151 ..  a Europa  x religia
Religion:	150 ..  a Wiara 450 ..  a Wiara religijna 150 ..  a Celibat  x aspekt religijny 450 ..  a Celibat kościelny 150 ..  a Indianie  x religia 450 ..  a Religia Indian	150 ..  a Adopcja  x aspekt społeczny
Sociology:	150 ..  a Socjofizyka 150 ..  a Konflikt (sociologia) 150 ..  a Architektura i społeczeństwo 450 ..  a Architektura  x socjologia 450 ..  a Architektura  x aspekt społeczny	150 ..  a Moda  x sociologia 150 ..  a Adopcja  x aspekt społeczny

The significant differences in the scope of application of SHL KABA domain subheadings should be taken into account when converting them into descriptive form (see Tables 6, 7 and 9). It is worth noting that SHL NLP subheadings expressing aspect do not come with such extensive comments on their application; the comments are usually limited to general information, for example “the subheading *filozofia* is used after general topics”, or they specify the scope of the domain, for example “the subheading *genetyka* is used after topics from the domain of biology, medical and veterinary sciences”.

Comparing SHL NLP headings with SHL KABA headings, Jadwiga Sadowska points out that in some SHL KABA headings the aspect is an “immanent part of the topic”.<sup>73</sup> This is shown, for example, by the following comparison:

SHL NLP: 150 .. /a *Nauznanie* /x *psychologia*

SHL KABA: 150 .. /a *Psychologia edukacji*

According to Sadowska, the existence of headings in which the subject is “hidden” and the aspect of the subject is exposed “leads [...] to the impression of a lack of clear rules for expressing the subject and its aspects and to the scattering of information”.<sup>74</sup>

In SHL KABA methodology, the problem of aspect being expressed, or not, in the topic of the heading is connected with the “connotations” of headings<sup>75</sup> - a central issue in the method of

73 J. Sadowska, *Język hasów przedmiotowych Biblioteki Narodowej...*, p. 178.

74 Ibidem, p. 184.

75 Connotation (intension), opposite of denotation: Meaning understood as the content, i.e. set of features of elements of non-linguistic reality on the basis of which a linguistic expression can be assigned in accordance with the semantics of the language in question (B. Bojar, *Słownik encyklopedyczny informacji...*, p. 143). Denotation (extension), opposite of connotation: Meaning understood as the scope, i.e. collection of elements of reality to which a linguistic expression can be assigned in accordance with the semantic rules of the language. The denotation of a unit name is the individual object referred to by this name (the designate), while the denotation of a general name is the set of all its designates [...]. In the description of information and search languages it is possible to distinguish between direct denotations and indirect denotations. A direct denotation is the set of direct designates of a given expression, while an indirect denotation is the set of its indirect designates (ibid., p. 47).

building extended headings in SHL KABA. In the field of ISLs, a “connotation” is defined as “a set of constitutive and characteristic features [...]”.<sup>76</sup> This can be seen in the case of established headings in SHL KABA, for example the established heading *150 .. /a Choroby autoimmunizacyjne* has a medical connotation.

SHL KABA subject subheadings expressing a connotation (see Table 3, 8) may only be used after headings not possessing said connotation. These subheadings therefore perform the task of lending a connotation to the element preceding them in the extended heading. After headings where the aspect (in other words, the connotation) forms an immanent part of the heading, it is not possible to use subheadings that provide a connotation. According to Przemysław Ćwikowski, “this indicates that certain terms acting as topics belong to the terminology of some domain or scientific discipline and are thus not neutral from the point of view of the aspect of the subject”.<sup>77</sup> The phrase “belong to the terminology of some domain or scientific discipline” in the quotation above is a reference to the methodology of RAMEAU, the immediate source of the SHL KABA’s lexicon and methodology. RAMEAU talks of “headings that belong to a certain domain” (French: *“domaine auquel appartient la notice”* or “domain to which the record belongs”) rather than the “connotation of headings”. These domains correspond to simplified Dewey Decimal Classification codes; for example the established heading *150 .. /a Quarks* is assigned the symbol 530 (Fizyka). The use of simplified Dewey Decimal Classification codes makes it easier to work with vocabulary and is also very helpful for the process of creating extended subject headings. In doubtful cases the codes indicate unambiguously the domain (connotation of the heading) and therefore suggest what subheading may be used after the heading.<sup>78</sup>

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76 B. Bojar, *Słownik encyklopedyczny informacji...*, p. 143.

77 P. Ćwikowski, *Język hasel przedmiotowych KABA wobec teorii Adama Lysakowskiego...*, p. 20.

78 Analogous codes began to be introduced in SHL KABA records in 2016 (NUKAT, Ustalenia – Pole 083. Symbol Klasyfikacji Dziesiętnej Deweya.)

Table 4 puts side-by-side established headings and extended headings in SHL KABA that contain domain subheadings giving a connotation (in bold) and those that do not have this function. The records for established headings with an immanent connotation, fragments of which appear in the middle column, indicate how to identify the connotation (in other words, the domain) to which the heading belongs:

Heading of the record:

Domain term, e.g. 150 .. /a *Prawo administracyjne*

Complement, e.g. 150 .. /a *Decyzja (etyka)*

Domain subheading, e.g. 150 .. /a *Celibat /x aspekt religijny*

Full reference (variant):

Domain term, e.g. 450 .. /a *Filozofia wojny*

Complement, e.g. 450 .. /a *Alimenti (prawo)*

Domain subheading, e.g. 450 .. /a *Architektura /x aspekt polityczny*

Broader term (overarching), e.g. 150 /a *Obraz ojca* - overarching term: 550 /wg /a *Psychologia*.

This method of creating extended headings using connotations is not found in SHL NLP. The evolution towards a post-coordinated language appears to be much simpler for SHL NLP than for SHL KABA. According to Jadwiga Sadowska, who focuses mainly on SHL NLP, the principle of expressing aspect is formulated clearly by Łysakowski but “is not always easy to apply in practice”.<sup>79</sup> A fundamental difficulty, she writes, is drawing a line between the subject and the aspect. Przemysław Ćwikowski expresses a similar opinion: “these phenomena [connotations] are rather difficult to describe within the framework of Łysakowski’s theory, with its clear separation of the scope from the contents of a book, which creates a fairly serious issue outside the realm of theory”.<sup>80</sup>

Another question regarding the transformation of subject headings in SHL NLP and SHL KABA into post-coordinated form is how

79 J. Sadowska, *Język hasiel przedmiotowych Biblioteki Narodowej...*, p. 178.

80 P. Ćwikowski, *Język hasiel przedmiotowych KABA wobec teorii Adama Łysakowskiego...*, p. 20.

to replace subheadings expressing aspect with descriptors. The solution that naturally suggests itself is to express the subheadings in the form of a “aspect descriptor” (Polish: *deskryptor ujęcia-wy*) using NLPD methodology.<sup>81</sup> In the case of SHL NLP, in which this group of subheadings are also called “aspect subheadings”,<sup>82</sup> the transformation raises certain problems (see Table 8 and notes on examples) which we discuss in the remainder of this article. In SHL KABA the transformation is much more complicated. An attempt to map SHL KABA subheadings giving a connotation and other domain subheadings and SHL NLP class subheadings to NLPD descriptors reveals that some of them (SHL KABA subheadings) can be transformed into aspect descriptors, and some into subject descriptors (Table 5).

The approach of comparing class subheadings in SHL NLP and domain subheadings in SHL KABA with subject and aspect descriptors in NLPD (see Table 5) can be used for transforming extended headings in both subject heading languages. However, apart from subheadings giving a connotation, other domain subheadings also exist in SHL KABA (see Table 3). These subheadings are more detailed than the class subheadings in SHL NLP, and an attempt to transform them into aspect descriptors in NLPD would cause significant generalisations of the meaning expressed in the extended headings in SHL KABA. With these subheadings, for the purposes of transformation it would be necessary to use subject descriptors and treat them as combinations of two subjects (see *Relationship between subjects*, p. 53). In the majority of cases the other domain subheading has a different scope of use than the subheading giving the connotation. For example, subheading 180 .. /x aspekt moralny gives an ethical connotation and can be used after all headings not possessing this connotation. By contrast, subheading 180 .. /x moralność can only be used after the names of categories of people.

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81 NLPD methodology is not within the scope of my analysis. However, we touch on some aspects of it where I write “according to NLPD methodology”.

82 J. Sadowska, *Język hasel przedmiotowych Biblioteki Narodowej...*, p. 123

TABLE 5. COMPARISON OF SHL NLP CLASS SUBHEADINGS AND SHL KABA DOMAIN SUBHEADINGS WITH NLPD ASPECT AND SUBJECT DESCRIPTORS

Domain	SHL NLP subheading	SHL KABA subheading	Subject descriptor	NLPD <sup>a</sup>	Aspect descriptor
Anthropology	180 ..  x antropologia	180 ..  x aspekt antropologiczny		658 ..  a Etnologia i antropologia kulturowa	
Economics	180 ..  x gospodarka	180 ..  x aspekt ekonomiczny 180 ..  x sytuacja gospodarcza (480 ..  a Gospodarka)	650 ..  a Gospodarka	658 ..  a Gospodarka, ekonomia, finanse	
Ethics	180 ..  x etyka	180 ..  x aspekt moralny 180 ..  x moralność	650 ..  a Moralność	658 ..  a Filozofia i etyka	
Philosophy	180 ..  x filozofia	180 ..  x sytuacja moralna 180 ..  x filozofia 180 ..  x estetyka 180 ..  x logika 180 ..  x metafizyka	650 ..  a Etyka 650 ..  a Moralność 650 ..  a Filozofia	658 ..  a Filozofia i etyka	
Physiology	180 ..  x fizjologia	180 ..  x aspekt fizjologiczny 180 ..  x fizjologia	650 ..  a Fizjologia <sup>a4</sup>	650 ..  a Fizjologia	
Genetics	180 ..  x genetyka	180 ..  x aspekt genetyczny 180 ..  x genetyka	650 ..  a Genetyka 650 ..  a Genetyka	650 ..  a Genetyka	
History	180 ..  x historia	180 ..  x historia	650 ..  a Historia	658 ..  a Medycyna i Zdrowie	
Medicine	180 ..  x medycyna	180 ..  x aspekt medyczny 180 ..  x aspekt zdrowotny	650 ..  a Zdrowie	658 ..  a Polityka, polityologia, administracja publiczna	
Political science	180 ..  x polityka	180 ..  x aspekt polityczny 180 ..  x polityka i rządy 180 ..  x działańność polityczna	650 ..  a Polityka wewnętrzna 650 ..  a Polityka	658 ..  a Polityka	
Para-psychology	---	180 ..  x aspekt parapsychiczny	650 ..  a Parapsychologia	658 ..  a Psychologia	
Psychology	180 ..  x psychologia	180 ..  x aspekt psychologiczny 180 ..  x psychologia	650 ..  a Psychologia	658 ..  a Psychologia	
Law	180 ..  x prawo	180 ..  x prawo 180 ..  x status prawnny	180 ..  x prawo	658 ..  a Prawo i wymiar sprawiedliwości	
Religion	180 ..  x religia	180 ..  x aspekt religijny 180 ..  x religia	650 ..  a Religia	658 ..  a Religia i duchowość	
Sociology	180 ..  x sociologia	180 ..  x aspekt społeczny 180 ..  x sociologia	650 ..  a Społeczeństwo	658 ..  a Sociologia i społeczeństwo	

- 83 The descriptor columns give the terms in fields 6XX so as to differentiate subject descriptors from aspect descriptors; the planned label of the heading of the record for the aspect descriptor is 150 in NLPD (as a subject descriptor).
- 84 The descriptor 150 .. |a *Fizjologia* does not appear in NLPD. Instead, detailed descriptors such as 150 .. |a *Fizjologia człowieka*, 150 .. |a *Fizjologia zwierząt* etc. are used for the purpose of clarity and for transformations of SHL KABA. The existence of a descriptor *Fizjologia* is assumed, and its creation in NLPD will be proposed.

Subheadings giving connotations in SHL KABA correspond to aspect descriptors in NLPD. These descriptors have a generalising character, like class subheadings in SHL NLP. However, in some cases a subheading in SHL KABA giving a connotation cannot be replaced by aspect descriptor due to the subheading's level of detail. For example, subheading 180 .. /x *aspekt fizjologiczny* does not have an equivalent aspect descriptor in NLPD. The closest aspect descriptor in terms of meaning would be 658 .. /a *Medycyna i zdrowie*; however, this does not properly convey the meaning of the extended heading (see Table 5).

Some subheadings in SHL KABA have more than one scope of use, for example subject subheading 180 .. /x *filozofia*. Two different solutions for the transformation are used in this case, depending on the situation:

After “titles of holy books and after proper headings, above all the names of domains of knowledge, for works on the fundamental theory of a given subject” (headings not possessing a philosophical connotation) - in such cases, except for transformations into a subject descriptor with the construction “Filozofia [przedmiot]”, one should use aspect descriptor 658 .. /a *Filozofia i etyka* and the subject descriptor from the transformation of the topic of the extended heading

After “personal names, only individuals who are not philosophers, for works on the topic of their philosophical concepts” - in such cases one should use two subject descriptors, one from the transformation of the personal name and the other the subject descriptor 650 .. /a *Filozofia*

SHL KABA also features some subheadings whose transformation into descriptor-based language can proceed in two different ways according to NLPD methodology. Thus the SHL KABA subheading can be replaced by either an aspect descriptor or a subject descriptor (see: Table 6, Comment 4; Table 7, Comment 5; and the conclusion below these two tables).

Before analysing of the possibility of transforming extended headings in subject heading languages into descriptor-based language, it is first necessary to carry out an analysis of the established headings indicating membership of the domain in question. In the case of estab-

blished headings with a specific connotation - in other words, where the aspect forms an immanent part of the meaning - the transformation is primarily subject to terminological criteria, that is to say, the occurrence of the term in literature and/or natural language. In the transformation (using NLPD methodology) of established subject headings that are broken down into two semantic elements (descriptors), once again the above-mentioned problem arises of choosing between a subject descriptor plus an aspect descriptor or two subject descriptors (see Table 6 and the description below).

**TABLE 6. MODEL FOR TRANSFORMING ESTABLISHED HEADINGS IN SHL  
KABA INTO DESCRIPTORS ACCORDING TO NLPD METHODOLOGY<sup>85</sup>**

Established heading in SHL KABA	NLPD86	
	Subject descriptor	Aspect descriptor
150 ..  a Plemiona	650 ..  a Plemiona	
150 ..  a Antropologia medyczna	650 ..  a Antropologia medyczna	
450 ..  a Choroby  x antropologia		
450 ..  a Choroby  x aspekt antropologiczny		
150 ..  a Zysk	650 ..  a Zysk	
150 ..  a Przemysł okrętowy	650 ..  a Przemysł okrętowy	
450 ..  a Budowa statku  x aspekt ekonomiczny		
150 ..  a Histereza (ekonomia)	650 ..  a Histereza (ekonomia)	
150 ..  a Przebaczenie	650 ..  a Przebaczenie	
150 ..  a Decyzyja (etyka)	650 ..  a Decyzyja (etyka)	
150 ..  a Etyka biznesu	650 ..  a Etyka biznesu	
450 ..  a Biznes  x aspekt moralny		
150 ..  a Epistemologia	650 ..  a Epistemologia	
150 ..  a Działanie (filozofia)	650 ..  a Działanie (filozofia)	
450 ..  a Filozofia działania		
450 ..  a Działanie  x filozofia		
150 ..  a Wojna  x filozofia	650 ..  a Filozofia wojny	
450 ..  a Filozofia wojny		
150 ..  a Dojrzewanie płciowe	650 ..  a Dojrzewanie płciowe	
450 ..  a Dojrzewanie płciowe  x aspekt fizjologiczny		
150 ..  a Fizjologia człowieka	650 ..  a Fizjologia człowieka	
450 ..  a Człowiek  x fizjologia		

85 For the sake of clarity, the column for subject descriptors contains terms arising from the transformation of SHL KABA according to NLPD methodology. These terms are often lacking in NLPD due to the more generalising nature of SHL NLP, the source of the vocabulary of NLPD. However, aspect descriptors are taken from NLPD, where they form a closed list.

86 See note 77.

150 ..  a Genetyka ewolucyjna	150 ..  a Genetyka ewolucyjna
450 ..  a Gatunki (biologia)  x evolution  x aspekt genetyczny	
150 ..  a Komplementacja (genetyka)	650 ..  a Komplementacja (genetyka)
150 ..  a Prawa Mendla	650 ..  a Prawa Mendla
550 ..  w g  a Genetyka	
150 ..  a Reformacja	650 ..  a Reformacja
150 ..  a Medycyna lotnicza	650 ..  a Medycyna lotnicza
450 ..  a Lot  x aspekt medyczny	
150 ..  a Grypa	650 ..  a Grypa
150 ..  a Syndrom przesunięcia czasu	650 ..  a Syndrom przesunięcia czasu
550 ..  w g  a Medycyna lotnicza	
150 ..  a Partie polityczne	650 ..  a Partie polityczne
150 ..  a Architektura i polityka	650 ..  a Architektura
450 ..  a Architektura  x aspekt polityczny	650 ..  a Polityka
150 ..  a Autorytaryzm	650 ..  a Autorytaryzm
550 ..  w g  a Nauki polityczne	
150 ..  a Kolor  x aspekt parapsychiczny	650 ..  a Kolor
450 ..  a Kolor i parapsychologia	650 ..  a Parapsychologia
450 ..  a Kolory  x aspekt parapsychiczny	
150 ..  a Psychologia humanistyczna	650 ..  a Psychologia humanistyczna
150 ..  a Identyfikacja (psychologia)	650 ..  a Identyfikacja (psychologia)
150 ..  a Obraz ojca	650 ..  a Obraz ojca
550 ..  w g  a Psychologia	
150 ..  a Prawo administracyjne	650 ..  a Prawo administracyjne
450 ..  a Administracja publiczna	
150 ..  a Zwierzęta  x prawo	650 ..  a Zwierzęta
450 ..  a Zwierzęta i prawo	650 ..  a Prawo
150 ..  a Obowiązek alimentacyjny	650 ..  a Obowiązek alimentacyjny
450 ..  a Alimenty (prawo)	
150 ..  a Wiara	650 ..  a Wiara
450 ..  a Wiara religijna	
150 ..  a Celibat  x aspekt religijny	650 ..  a Celibat kościoły
450 ..  a Celibat kościelny	
150 ..  a Indianie  x religia	650 ..  a Religia Indian
450 ..  a Religia Indian	
150 ..  a Socjofizyka	650 ..  a Socjofizyka
150 ..  a Konflikt (socjologia)	650 ..  a Konflikt (socjologia)
150 ..  a Architektura i społeczeństwo	650 ..  a Architektura
450 ..  a Architektura  x socjologia	650 ..  a Spoleczeństwo
450 ..  a Architektura  x aspekt społeczny	

87 Pairs of descriptors only one of which may be used, depending on the method of transformation chosen, are given in italics.

The model for transforming established headings in SHL KABA is based on the following principles:

1. Occurrence of the term in literature and/or natural language, in order to facilitate searches. In these descriptors, contrary to Łysakowski's requirement, the aspect forms an immanent part of the subject. The criterion of the term occurring in literature and/or natural language prevails
2. In the case of established headings with a complex structure (topic and subject subheading), the term given as a variant is used as the subject descriptor if said term occurs in literature and/or natural language, for example 650 .. /a Filozofia wojny from the transformation of established heading 150 .. /a Wojna /x filozofia
3. In the case of established headings with a complex structure (topic and subject subheading), if a variant exists which is a term occurring in literature and/or natural language and the subject subheading does not contain the name of a domain which can become an aspect descriptor, the names of the juxtaposed subjects are used as subject descriptors (see also *Relationship between subjects - juxtaposition*, p. 58), for example 650 .. /a Kolor and 650 .. /a Parapsychologia from the transformation of heading 150 .. /a Kolor /x aspekt parapsychiczny
4. In the case of juxtaposition of subjects, where the descriptor is not its own special name for the relationship (see *Relationship between subjects*, p. 53), the names of the juxtaposed subjects are used as the subject descriptors in the transformation, for example 650 .. /a Architektura and 650 .. /a Polityka from the transformation of heading 150 .. /a Architektura i polityka, or, if the established heading (or its variant) contains a domain subheading giving a connotation which can be changed into an aspect descriptor, a subject descriptor and aspect descriptor are used in the transformation, for example 650 .. /a Architektura and 658 .. /a Polityka, politologia, administracja publiczna from the transformation of heading 150 .. /a Architektura i polityka, 450 .. /a Architektura /x aspekt polityczny

**TABLE 7. MODEL FOR TRANSFORMING EXTENDED HEADINGS IN SHL KABA INTO DESCRIPTORS ACCORDING TO NLPD METHODOLOGY**

Extended heading in SHL KABA	NLPD <sup>88</sup>	
	Subject descriptor	Aspect descriptor
150 ..  a Dotyk  x aspekt antropologiczny	650 ..  a Dotyk	658 ..  a Etnologia i antropologia kulturowa
150 ..  a Antysemityzm  x aspekt ekonomiczny	650 ..  a Antysemityzm	658 ..  a Gospodarka, ekonomia, finanse
151 ..  a Afryka Południowa  x sytuacja gospodarcza	651 ..  a Afryka Południowa 650 ..  a Gospodarka	
150 ..  a Ekonomia  x aspekt moralny	650 ..  a Ekonomia 600 1.  a Rousseau, Jean Jacques  d (1712-1778)	658 ..  a Filozofia i etyka
100 1.  a Rousseau, Jean Jacques  d (1712-1778)  x etyka	650 ..  a Etyka	
150 ..  a Alpinisiści  x moralność	650 ..  a Alpinisiści 650 ..  a Etyka	
151 ..  a Rosja  x sytuacja moralna	650 ..  a Etyka 651..  a Rosja	
150 ..  a Ból  x filozofia	650 ..  a Ból	658 ..  a Filozofia i etyka
100 1.  a Austen, Jane  d (1775-1817)  x filozofia	600 1.  a Austen, Jane  d (1775-1817) 650 ..  a Filozofia	
100 1.  a Balzac, Honoré de  d (1799-1850)  x estetyka	600 1.  a Balzac, Honoré de  d (1799-1850) 650 ..  a Estetyka	
100 1.  a Milosz, Oskar Vladislas Lubicz de  d (1877-1939)  x metafizyka	100 1.  a Milosz, Oskar Vladislas Lubicz de  d (1877-1939) 650 ..  a Metafizyka	
100 1.  a Struve, Henryk  d (1840-1912)  x logika	100 1.  a Struve, Henryk  d (1840-1912) 650 ..  a Logika	
150 ..  a Emocje  x aspekt fizjologiczny	650 ..  a Emocje 650 ..  a Fizjologia <sup>89</sup>	
150 ..  a Histamina  x aspekt fizjologiczny	650 ..  a Histamina 650 ..  a Fizjologia	
150 ..  a Dzieci  x fizjologia	650 ..  a Dzieci 650 ..  a Fizjologia	
150 ..  a Inteligencja  x aspekt genetyczny	650 ..  a Inteligencja 650 ..  a Genetyka	
150 ..  a Rośliny strączkowe  x genetyka	650 ..  a Rośliny strączkowe 650 ..  a Genetyka	
150 ..  a Urbanistyka  x historia	650 ..  a Urbanistyka	658 ..  a Historia
150 ..  a Ubóstwo  y 1990-	650 ..  a Ubóstwo	658 ..  a Historia
151 ..  a Nigeria  y 19 w.	651 ..  a Nigeria	658 ..  a Historia
150 ..  a Podróże  x aspekt medyczny	650 ..  a Podróże	658 ..  a Medycyna i zdrowie 658 ..  a Medycyna i zdrowie <sup>90</sup>
150 ..  a Ogień  x aspekt zdrowotny	650 ..  a Ogień 650 ..  a Zdrowie	

88 See note 77.

89 See note 78.

90 See note 81.

150 ..  a Aborcja  x aspekt polityczny	650 ..  a Aborcja	658 ..  a Polityka, politologia, administracja publiczna
151 ..  a Polska  x polityka i rządy  y 17 w.	651 ..  a Polska 650 ..  a Polityka wewnętrzna	
150 ..  a Katolicy  x działalność polityczna	650 ..  a Katolicy 650 ..  a Polityka	
150 ..  a Drzewa  x aspekt parapsychiczny	650 ..  a Drzewa 650 ..  a Parapsychologia	
150 ..  a Alpinizm  x aspekt psychologiczny	650 ..  a Alpinizm	658 ..  a Psychologia
100 0 ..  a Abel  c (postać biblijna)  x psychology	100 0 ..  a Abel  c (postać biblijna) 650 ..  a Psychology	
150 ..  a Handel elektroniczny  x prawo	650 ..  a Handel elektroniczny	658 ..  a Prawo i wymiar sprawiedliwości
150 ..  a Bezrobotni  x status prawny	650 ..  a Bezrobotni	658 ..  a Prawo i wymiar sprawiedliwości
150 ..  a Alchemia  x aspekt religijny	650 ..  a Alchemia	658 ..  a Religia i duchowość
151 ..  a Europa  x religia	651 ..  a Europa 650 ..  a Religia	
150 ..  a Adopcja  x aspekt społeczny	650 ..  a Adopcja 650 ..  a Społeczeństwo	
150 ..  a Moda  x socjologia	650 ..  a Moda	658 ..  a Socjologia i społeczeństwo

The model for transforming extended headings in SHL KABA is based on the following principles:

1. Subject domain subheadings not expressing aspect are transformed into subject descriptors, for example 650 .. |a Etyka<sup>91</sup> from the transformation of heading 150 .. |a Alpiniści |x moralność
2. In the case of extended headings with the structure 151.. |a [geographical name] |x [subject subheading], the subject subheading is transformed into a subject descriptor and the geographical name is transformed into a geographical descriptor. As it is impossible to transform a topic expressed as a geographical name into a subject descriptor - since the geographical name acts as the subject (see *Subject expressed in the topic of the heading*, p. 10) - the term acting as the subject subheading prior to the transformation acts as the subject as far as possible, for example: 650 ..

91 The term "moralność" is a variant of the descriptor ("ascriptor") 150 .. |a Etyka in NLPD. SHL KABA distinguishes between the established headings 150 .. |a Etyka and 150 .. |a Moralność. The adoption of this solution will probably be proposed in NLPD for the purpose of classifying libraries that currently use SHL KABA.

- /a Gospodarka i 651 .. /a Afryka Południowa from the transformation of heading 151 .. /a Afryka Południowa /x sytuacja gospodarcza; 650 .. /a Etyka and 651 .. /a Rosja from the transformation of heading 151 .. /a Rosja /x sytuacja moralna; 650 .. /a Religia and 651 .. /a Europa from the transformation of heading 151 .. /a Europa /x religia
3. In the case of subheadings which have different scopes of use depending on the topic they follow, various solutions are used for the transformation. For example, subheading 180 .. /x filozofia after headings with no philosophical connotation is transformed into the aspect descriptor *Filozofia i etyka* (650 .. /a Ból and 658 .. /a Filozofia i etyka from the transformation of heading 150 .. /a Ból /x filozofia), and after personal names it is transformed into the subject descriptor *Filozofia* (e.g. 600 1. /a Austen, Jane /d (1775-1817) and 650 .. /a Filozofia from the transformation of heading 100 1. /a Austen, Jane /d (1775-1817) /x filozofia)
  4. In the case of extended headings with a historical connotation (containing a chronological subheading), where the heading of the record has a label other than 155, the aspect descriptor 658 .. /a Historia is used in the transformation
  5. In all extended headings, a domain subheading giving a connotation may be replaced in the transformation by an aspect descriptor or the corresponding subject descriptor, for example: 650 .. /a Ból and 650 .. /a Filozofia from the transformation of heading 150 .. /a Ból /x filozofia; 650 .. /a Alpinizm; 650 .. /a Psychologia from the transformation of heading 150 .. /a Alpinizm /x aspekt psychologiczny

The table simulating the transformation of extended headings in SHL KABA into descriptors according to NLPD methodology (Table 7) shows the use of an aspect descriptor in each case where such a descriptor may be used (that is, where one exists for the domain in question and it meets the criteria for the transformation - see comment below Table 7). The choice of a different methodology (other than NLPD) for transforming this language into descriptor form makes it possible to use only subject descriptors (see Table 9). The aspect descriptor in NLPD methodology comes directly from SHL

NLP methodology, based on Łysakowski's theory, which has class subheadings with exactly the same function as aspect descriptors. The transformation of SHL NLP into NLPD is therefore a natural process, the next step in the evolution of the language (see Table 8). With the transformation of SHL KABA, by contrast, the direction of the evolution is a matter of conscious choice.

**TABLE 8. MODEL FOR TRANSFORMING EXTENDED HEADINGS IN SHL NLP INTO NLPD**

Extended heading in SHL NLP	Subject descriptor	NLPD <sup>92</sup>	Aspect descriptor
150 ..  a Cyganie  x antropologia	650 ..  a Cyganie	658 ..  a Etnologia i antropologia kulturowa	
150 ..  a Żydzi  x gospodarka	650 ..  a Żydzi	658 ..  a Gospodarka, ekonomia, finanse	
150 ..  a Aborcja  x etyka	650 ..  a Aborcja	658 ..  a Filozofia i etyka	
150 ..  a Matematyka  x filozofia	650 ..  a Matematyka	658 ..  a Filozofia i etyka	
150 ..  a Oddychanie  x fizjologia	650 ..  a Oddychanie 650 ..  a Fizjologia [...93]		
150 ..  a Choroby psychiczne  x genetyka	650 ..  a Choroby psychiczne 650 ..  a Genetyka		
150 ..  a Rap  x historia	650 ..  a Rap	658 ..  a Historia	
150 ..  a Temperatura  x medycyna	650 ..  a Temperatura	658 ..  a Medycyna i zdrowie	
150 ..  a Polacy za granicą  x polityka	650 ..  a Polacy za granicą	658 ..  a Polityka, politologia, administracja publiczna	
150 ..  a Sport  x psychologia	650 ..  a Sport	658 ..  a Psychologia	
150 ..  a Zwierzęta  x prawo	650 ..  a Zwierzęta	658 ..  a Prawo i wymiar sprawiedliwości	
150 ..  a Śmierć  x religia	650 ..  a Śmierć	658 ..  a Religia i duchowość	
150 ..  a Małżeństwo  x socjologia	650 ..  a Małżeństwo	658 ..  a Socjologia i społeczeństwo	

The main problem when transforming SHL NLP class subheadings into descriptors is their ambiguity. Subheading *180 .. |x etyka* can mean ethics in the sense of the domain, or it can mean morality.<sup>94</sup> For users who are not familiar with the methodology underlying class subheadings, a heading with this subheading is ambiguous. Another example is subheading *180 .. |x archeologia*. After

92 See note 77.

93 NLPD does not have a separate descriptor *150 .. |a Fizjologia*. In the transformation of the extended heading in SHL NLP, one of the existing descriptors is used: *150 .. |a Fizjologia człowieka*, *150 .. |a Fizjologia roślin*, etc.

94 J. Sadowska, *Język haseł przedmiotowych Biblioteki Narodowej...*, p. 124.

a geographical name, according to *Poradnik BN* this subheading is used in the classification of documents “on the topic of archaeological excavations, and also on archaeological sites in the area in question”.<sup>95</sup> It is not therefore the aspect of the subject but rather the subject itself that can be located by means of a geographical descriptor.

Looking at the history of SHL NLP, in the 1990s we see an increase in the number of multi-word topics replacing constructions consisting of a topic and a class subheading. Instead of extended heading 150 .. /a *Biznes /x etyka*, the heading 150 .. /a *Etyka biznesu* appeared. The new heading expresses the subject and the aspect together. According to Jadwiga Sadowska, there could be several reasons for the emergence of this type of subject heading, such as a mistaken understanding of Łysakowski’s concept or the lack of an appropriate subheading.<sup>96</sup> However, we can also see the emergence of multi-word topics as reflecting a tendency to bring the language of subject headings closer to natural language, in order to make searches easier.

The example “etyka biznesu” (“business ethics”) draws attention to a necessary stage in the process of transforming a pre-coordinated subject heading language into post-coordinated form. If a heading consisting of a topic and a subheading (even if it is a class/aspect/domain subheading) expresses an element of non-documentary reality existing on its own and having its own name, a separate subject descriptor should be created for it. This stage involves transforming established headings with complex structures into (multi-word) descriptors, and should precede the breaking down of extended headings. This applies to both?? the subject heading languages analysed here.

As mentioned earlier, subject heading languages can be transformed without using aspect descriptors and using only subject descriptors instead (Table 9).

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95 *Poradnik...*, Part 7, p. 160.

96 *Ibidem*, p. 180.

**TABLE 9. MODEL FOR TRANSFORMING EXTENDED HEADINGS IN SHL KABA INTO SUBJECT DESCRIPTORS ONLY**

Extended heading in SHL KABA	Subject descriptor <sup>97</sup>
150 ..  a Dotyk  x aspekt antropologiczny	650 ..  a Dotyk 650 ..  a Antropologia
150 ..  a Antysemityzm  x aspekt ekonomiczny	650 ..  a Antysemityzm 650 ..  a Ekonomia
151 ..  a Afryka Południowa  x sytuacja gospodarcza	651 ..  a Afryka Południowa 650 ..  a Gospodarka
150 ..  a Ekonomia  x aspekt moralny	650 ..  a Ekonomia 650 ..  a Etyka
100 1.  a Rousseau, Jean Jacques  d (1712-1778)  x etyka	600 1.  a Rousseau, Jean Jacques  d (1712-1778) 650 ..  a Etyka
150 ..  a Alpiniści  x moralność	650 ..  a Alpiniści 650 ..  a Etyka
151 ..  a Rosja  x sytuacja moralna	650 ..  a Etyka 651 ..  a Rosja
150 ..  a Ból  x filozofia	650 ..  a Ból 650 ..  a Filozofia
100 1.  a Austen, Jane  d (1775-1817)  x filozofia	600 1.  a Austen, Jane  d (1775-1817) 650 ..  a Filozofia
100 1.  a Balzac, Honoré de  d (1799-1850)  x estetyka	600 1.  a Balzac, Honoré de  d (1799-1850) 650 ..  a Estetyka
100 1.  a Milosz, Oskar Vladislas Lubicz de  d (1877-1939)  x metafizyka	100 1.  a Milosz, Oskar Vladislas Lubicz de  d (1877-1939) 650 ..  a Metafizyka
100 1.  a Struve, Henryk  d (1840-1912)  x logika	100 1.  a Struve, Henryk  d (1840-1912) 650 ..  a Logika
150 ..  a Emocje  x aspekt fizjologiczny	650 ..  a Emocje 650 ..  a Fizjologia
150 ..  a Histamina  x aspekt fizjologiczny	650 ..  a Histamina 650 ..  a Fizjologia
150 ..  a Dzieci  x fizjologia	650 ..  a Dzieci 650 ..  a Fizjologia
150 ..  a Inteligencja  x aspekt genetyczny	650 ..  a Inteligencja 650 ..  a Genetyka
150 ..  a Rośliny strączkowe  x genetyka	650 ..  a Rośliny strączkowe 650 ..  a Genetyka
150 ..  a Urbanistyka  x historia	650 ..  a Urbanistyka 650 ..  a Historia
150 ..  a Ubóstwo  y 1990-	650 ..  a Ubóstwo 650 ..  a Historia
151 ..  a Nigeria  y 19 w.	651 ..  a Nigeria 650 ..  a Historia
150 ..  a Podróże  x aspekt medyczny	650 ..  a Podróże 650 ..  a Medycyna
150 ..  a Ogień  x aspekt zdrowotny	650 ..  a Ogień 650 ..  a Zdrowie

97 Analogously to previous tables, this column contains descriptors with the label 650; see also note 77.

150 ..  a Aborcja  x aspekt polityczny	650 ..  a Aborcja
150 ..  a Polska  x polityka i rządy  y 17 w.	650 ..  a Polityka wewnętrzna 650 ..  a Katolicy
150 ..  a Katolicy  x działalność polityczna	650 ..  a Polityka 650 ..  a Drzewa
150 ..  a Drzewa  x aspekt parapsychiczny	650 ..  a Drzewa 650 ..  a Parapsychologia
150 ..  a Alpinizm  x aspekt psychologiczny	650 ..  a Alpinizm 650 ..  a Psychologia
100 0 ..  a Abel  c (postać biblijna)  x psychologia	100 0 ..  a Abel  c (postać biblijna) 650 ..  a Psychologia
150 ..  a Handel elektroniczny  x prawo	650 ..  a Handel elektroniczny 650 ..  a Prawo
150 ..  a Bezrobotni  x status prawny	650 ..  a Bezrobotni 650 ..  a Prawo
150 ..  a Alchemia  x aspekt religijny	650 ..  a Alchemia 650 ..  a Religia
151 ..  a Europa  x religia	651 ..  a Europa 650 ..  a Religia
150 ..  a Adopcja  x aspekt społeczny	650 ..  a Adopcja 650 ..  a Społeczeństwo
150 ..  a Moda  x socjologia	650 ..  a Moda 650 ..  a Socjologia

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The second option for transforming a pre-coordinated language (see Table 9), in which subheadings expressing aspect are transformed into subject descriptors, after appropriate adjustment (e.g. changing subheading 180 .. /x aspekt społeczny to the subject descriptor 650 .. |a Społeczeństwo), leads to treating the designate of the extended heading as a relationship between subjects (see *Relationship between subjects*, p. 53).

### RELATIONSHIP BETWEEN SUBJECTS

A specific type of subject is the relationship between two elements, which Jadwiga Sadowska describes, following Łysakowski, as a “relationship between subjects”.<sup>98</sup> If this is expressed in a single extended subject heading in a pre-coordinated language, it is most often recorded using a subject subheading (recorded in MARC format).

Łysakowski writes about the relationship between subjects in the context of parallel subjects “where the relationship between

98 J. Sadowska, *Hasła przedmiotowe w teorii Adama Łysakowskiego...*, p. 108.

objects is presented, [...], that is to say, a comparison (similarities, differences, the opposite) or true dependency (causal relationship, mutual dependence, influences, etc.)".<sup>99</sup> The fragment quoted describes two types of relationship expressing different kinds of connections between two elements:

Juxtaposition – a relationship of juxtaposition between two subjects, with or without specific context or aspect. This correlates to Łysakowski's definition "comparison (similarities, differences, the opposite) or a real relationship ([...] mutual dependence [...])"<sup>100</sup>

Dependency – a relationship of dependency of one subject on another subject. This correlates to Łysakowski's definition "[...] true dependency (causal relationship, [...], influences, etc.)"<sup>101</sup>

The most common syntactic construction for expressing relationships of comparison in the pre-coordinated languages in question is the subject subheading "|x a [subject]" in SHL NLP and "|x i [subject]" in SHL KABA. A few cases of this type of construction are recorded in a single subfield of an established heading, for example 150 .. /a Kościół i państwo (an established heading in SHL NLP). We may assume that such constructions were created in cases where the relationship between the elements is a subject in itself and is widely represented in documents in library catalogues. The example quoted above – (150 .. /a Kościół i państwo) – combines different elements, at least one of which does not appear as an independent lexical unit in SHL NLP.<sup>102</sup>

It is necessary to distinguish between syntactic structures connecting two subjects and multi-word headings consisting of two elements linked by the word "i" ["and"], used most often for terms that are closely related semantically and for antonyms, which according to Sadowska often express concepts that are presented together in

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99 A. Łysakowski, *Katalog przedmiotowy...*, p. 34.

100 Ibidem, p. 34.

101 Ibidem, p. 34.

102 B. Włodarczyk, J. Woźniak-Kasperek, *Język Hasel Przedmiotowych Biblioteki Narodowej...*, p. 136.

documents.<sup>103</sup> Examples occur in both SHL KABA (for example 150 .. /a *Wiedza i erudycja*, 150 .. /a *Uniwersytety i uczelnie*) and SHL NLP (for example 150 .. /a *Antygeny i przeciwciała*, 150 .. /a *Kawiarnie i cukiernie*<sup>104</sup>). Similar structures can be found in RAMEAU (for example 150 .. /a *Critique et interprétation*, 150 .. /a *Savoir et erudition*) and LCSH (for example 150 .. /a *Good and evil*, 150 .. /a *Learned institutions and societies*). The individual elements within such combinations do not appear as independent established headings. They may appear in the record of the established heading as a variant, for example the term *Evil* as a variant of established heading 150 ... /a *Good and evil*. The purpose of creating such structures is to avoid the dispersion of documents. The creators of the NLPD project shared this objective in preserving combinations of this type, for example the descriptors 150 .. /a *Legendy i podania* and 150 .. /a *Rodzaje i gatunki literackie*.

“Relationship between subjects” in Łysakowski’s theory refers to two subjects which the author proposes treating as main subjects and recording as topics; in this case, that means that the subject description should be multiple in nature.<sup>105</sup> In SHL NLP the connector “a” [“and”] is used between the two elements: recorded in MARC 21 format, we have the connector “a” together with the second element in a separate subfield for the factual description, for example 150 .. /a *Kościół* /x a *państwo*. Both elements in connections of this type are usually independent topics in all the languages in which they occur.

In both the subject heading languages discussed here, the above constructions can be used in reverse order, creating a multiple description. In SHL NLP methodology this is called a “reversal” of headings,<sup>106</sup> for example 151 .. /a *Polska* /x a *Francja* and 151 .. /a *Francja* /x a *Polska*. However, this has a different meaning from the principle of adding general headings to specific headings, which we mentioned earlier. Łysakowski argues for creating multiple descriptions

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103 J. Sadowska, *Język hasał przedmiotowych Biblioteki Narodowej...*, p. 71.

104 Ibidem, p. 71.

105 A. Łysakowski, *Katalog przedmiotowy...*, pp. 34, 67-68.

106 J. Sadowska, *Język hasał przedmiotowych Biblioteki Narodowej...*, p. 211.

by creating separate catalogue cards, in which “each [element] becomes a topic on a separate catalogue card and at the same time the subheading (often generalised) of the second topic”.<sup>107</sup>

In SHL KABA a relationship between two subjects is expressed by a combination of a topic and a subject subheading with the structure “i [subject]” and “i [geographical name]”,<sup>108</sup> for example: 100 1. /a Tusk, Donald /d (1957- ) /x i stosunki międzynarodowe, 110 2. /a Unia Europejska /x i edukacja, 100 0. /a Napoleon /b I /c (cesarz Francuzów ; /d 1769-1821) /x i Europa, 110 2. /a Unia Europejska /x i Polska. The structure in SHL KABA with the “i” starting the subject subheading is analogous to the structure in SHL NLP with the “a” described further above. The “i” also connects two subjects with a relationship between them. This structure in SHL KABA is modelled on similar structures in RAMEAU and LCSH: “et” in the natural language French and “and” in English can be translated as either “i” or “a”.

It should be noted that in all the languages discussed here, constructions with a subject subheading starting with “i” or “a” combine different types of headings (common name, personal name, name of collective body, geographical name) with just two types of heading in their topic: a common name or geographical name. A geographical name in the subheading expresses the subject entering into the relationship (the country as a state), not the location.

In the transformation of a structure with a geographical name into post-coordinated form, as in the example 110 2. /a Unia Europejska /x i Polska, the application of the above method leads once again to the problem described earlier. The geographical name from the extended heading cannot be transformed into a geographical descriptor because it was used in the function of a subject, not a location. The same problem occurs when trying to transform a pre-coordinated structure expressing a relationship between countries. Such structures exist in both the subject heading languages discussed:

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107 A. Łysakowski, *Katalog przedmiotowy...*, p. 68.

108 In the NUKAT catalogue database both constructions are described in a single record of the total indicative reference *i [...]*.

SHL NLP: 151 .. /a Polska /x polityka /z Francja

SHL KABA: 151 .. /a Polska /x stosunki zagraniczne /z Francja

Subject subheadings 180 .. /x polityka and 180 .. /x stosunki zagraniczne indicate a specific type of relationship between subjects, as opposed to a relationship that is not further defined and which is recorded using a subject subheading starting with “a” or “i”. This type of relationship consists of the juxtaposition of two elements, in the examples above two countries in specific contexts, the first political, the second international. When transforming this type of relationship from a pre-coordinated language into the post-coordinated NLPD, two subject descriptors and an additional aspect descriptor (658 .. /a Polityka, politologia, administracja publiczna) or subject descriptor (650 .. /a Polityka i 650 .. /a Stosunki zagraniczne) could appear. The subjects entering into political or foreign relations are countries expressed in a geographical name. The subjects in the relationship cannot be transformed into geographical descriptors as these are used to indicate the location of a subject, not the subject itself.

SHL NLP also has other structures described as “expressing a particular type of relationship between subjects”:<sup>109</sup> 651 [country] |x a [country] |x [type of relationship], for example 651.. Polska /x a Rosja /x gospodarka. An additional subject subheading expressing, according to the authors of the cited publication, “the type of relationship between subjects” can also be read as indicating the subject of these relations. This structure is thus an example of a multiple complex structure, of the type encountered more often in SHL KABA (see *Subject expressed in a general subheading*, p. 20). In this example the subject of the publication is relations between “Polska” [“Poland”] and “Rosja” [“Russia”], and the subject of these relations is economic. In this case the subject of the document is similar in its semantic scope to the examples 151.. /a Polska /x polityka /z Francja described earlier, but they differ in the way they are written in the syntax of SHL NLP. The effect of transforming this structure into

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<sup>109</sup> B. Włodarczyk, J. Woźniak-Kasperek, *Język Hasel Przedmiotowych Biblioteki Narodowej...*, p. 136.

NLPD would be the descriptors *65X .. /a Polska, 65X .. /a Rosja, 650 .. /a Gospodarka*, with the reservation that both geographical names express the subject, not the location of the subject.

Another example of a relationship of juxtaposition in SHL KABA is extended headings comparing two languages, in which the subheadings *180 .. /x gramatyka porównawcza* and *180 .. /x fonologia porównawcza* are used. These structures juxtapose two languages and, in the course of indexing, two “symmetrical” (reversed) extended headings are created. The use of a language as a subject subheading is unusual for SHL KABA: the established headings for the names of languages do not function as subheadings. For this reason SHL KABA methodology recommends creating combinations of subheadings in the authority file with the structure “*180 .. /x gramatyka / fonologia porównawcza /x język [name of language]*”, also known as “related structures”.

The recording of subject headings in MARC format was a breakthrough in the evolution of pre-coordinated languages. The choice of structure - a simple established heading (single or multi-word) or a complex structure divided into subfields - indicated the direction of further changes in the direction of post-coordination.

There is a difference between cases where, in the course of indexing a document, a relationship between two elements (as the subject of the document) is expressed in pre-coordinated grammar by the syntactical juxtaposition of elements that exist independently (established headings) and cases where that relationship is named by means of a single lexical unit. In the first case, in post-coordinated grammar the subject of the work is expressed in the indexing and reproduced in the search in the same way, that is by juxtaposing independent semantic elements (descriptors) - two of them if the relationship is “not further defined”, and three if the relationship is “concrete”. The relationship (as the subject of the document) is an implied value in this case. In the second case the relationship has its own special name and will be recorded and searched for as the subject of the work. Tables 10 and 11 give examples of the recording of relationships of juxtaposition (as the sub-

ject of the document). In some cases the choice of structure does not seem obvious (for example 150 .. |a Kobiety i literatura); this could equally well be recorded in the form of a topic with a subheading, with two descriptors created in the course of the transformation.

To enable users to search for headings in the card catalogue, recording relationships as subjects required creating multiple descriptions. Computerised catalogues using indexes also required the creation of reversed headings.<sup>110</sup> Changing the syntax to post-coordinated form significantly reduces the number of access points that need to be created.

**TABLE 10. EXPRESSION OF RELATIONSHIPS OF JUXTAPOSITION IN SHL NLP AND MODELLING OF THEIR TRANSFORMATION INTO A DESCRIPTOR LANGUAGE**

Heading in SHL NLP	Descriptor for name of relationship	Descriptors for elements entering into the relationship
150 ..  a Ojcowie i córki	150 ..  a Ojcowie i córki	
151 ..  a Polska  x a Rosja  x handel		151 <sup>w</sup> ..  a Polska 151 ..  a Rosja 150 ..  a Handel
151 ..  a Polska  x polityka  z Francja		151 ..  a Francja 151 ..  a Polska 150 ..  a Polityka

**TABLE 11. EXPRESSION OF RELATIONSHIPS OF JUXTAPOSITION IN SHL KABA AND MODELLING OF THEIR TRANSFORMATION INTO A DESCRIPTOR LANGUAGE**

Heading in SHL KABA	Descriptor for name of relationship	Descriptors for elements entering into the relationship
100 0 ..  a Augustyn  c (św. ;  d 354-430)  x i kobiety		100 0 ..  a Augustyn  c (św. ;  d 354-430) 150 ..  a Kobiety
150 ..  a Język polski  x gramatyka porównawcza  x język francuski		150 ..  a Język polski 150 ..  a Gramatyka porównawcza 150 ..  a Język francuski
150 ..  a Kobiety i literatura	150 ..  a Kobiety i literatura	
150 ..  a Kościół i państwo	150 ..  a Kościół i państwo	
150 ..  a Ojcowie i córki	150 ..  a Ojcowie i córki	
150 ..  a Relacja miłość-nienawiść	150 ..  a Relacja miłość-nienawiść	
110 2 ..  a Unia Europejska  x i edukacja		150 ..  a Edukacja 110 2 ..  a Unia Europejska

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- 110 It should be noted that the position of the lexical element in the extended heading in the subject heading language is closely linked to its meaning; the same term used as a topic has a different meaning when used as a subheading.
- 111 The label for the geographical descriptor in all geographical names in the right-hand column of Table 10 does not agree with the nature of the designate of the descriptor (see *Subject expressed in the topic of the heading*, p. 10).

The second type of relationship between subjects is one of dependency. Łysakowski describes this as a “causal relationship”, “influences, etc.”.<sup>112</sup>

In subject headings expressing a relationship of dependency, the elements constituting them are not equivalent. According to LCSH methodology:

constructions of this type are possible because the work being indexed focuses mainly on the effect, influence or relationship from the perspective of the main subject, represented by the topic itself, with a secondary emphasis on another subject, which is a subject having an effect or influence, represented by the subheading.<sup>113</sup>

The description of this type of structure contains elements that can be seen as a definition of a type of relationship:

- the differentiation of two subjects with a different degree of “exposure” in the document being catalogued, namely a primary subject and a secondary subject
- the dependency between the subjects, without which it is not possible to express the subject of the document

Among the subheadings used in these constructions (relationships of dependency), LCSH includes the following: *180 .. /a Effect of [...] on*, *180 .. /a [...] influences*, *180 .. /a Psychological aspect*, *180 .. /a Social aspect*. The last two examples - *180 ... /a Psychological aspect* and *180 ... /Social aspect* - can be viewed differently, namely as expressing the aspect in which the subject of the document expressed in the topic is presented (see *Aspect of the subject*, p. 33, for a detailed discussion of this issue).

SHL NLP and SHL KABA both have constructions expressing relationships of dependency. Such relationships are expressed in the form of a single extended subject heading (examples of such subheadings in SHL KABA: *150 .. /a dzieła* - [domain], *150 .. /a kariera* - [domain], *150 .. /a kolekcje* [type of collection], *150 .. /a roszczenia wobec*

<sup>112</sup> A. Łysakowski, *Katalog przedmiotowy...*, p. 34.

<sup>113</sup> Library of Congress. *Subject Heading Manual* - <https://www.loc.gov/aba/publications/FreeSHM/freeshm.html> [accessed 14.12.2019], H0310 - <https://www.loc.gov/aba/publications/FreeSHM/H0310.pdf> [accessed 14.12.2019].

[...], 150 .. |a *wkład do [...]*, 150 .. |a *zbiory specjalne* – [type of collection]; and in SHL NLP: 150 .. |a *stosowanie* – [domain], 150 .. |a *udział* [country, nationality], 150 .. |a *wpływ na [...]*; 50 .. |a *wpływ na [...]*) or in the form of two subject headings (examples from SHL KABA: 180 .. |x *wpływ*, 180 .. |x *w sztuce*, 180 .. |x *w literaturze*; and in SHL NLP: 180 .. |x *w sztuce*, 180 .. |x *w teatrze*, etc.) (Tables 12 and 13).

**TABLE 12. EXPRESSION OF RELATIONSHIPS OF DEPENDENCY  
IN SHL NLP AND MODELLING OF THEIR TRANSFORMATION INTO  
A DESCRIPTOR LANGUAGE**

Headings - 1 heading in SHL NLP	Headings - 2 headings in SHL NLP	Descriptors
150 ..  a Detektor promieniowania  x stosowanie  x medycyna		150 ..  a Detektor promieniowania 150 ..  a Medycyna
	150 ..  a Kobieta  x w sztuce 155 ..  a Ekslibrisy  x tematyka	150 ..  a Kobieta 150 ..  a Ekslibrisy 150 ..  a Tematy i motywów
150 ..  a Sole  x wpływ na środowisko		150 ..  a Sole 150 ..  a Środowisko człowieka

**TABLE 13. EXPRESSION OF RELATIONSHIPS OF DEPENDENCY  
IN SHL KABA AND MODELLING OF THEIR TRANSFORMATION INTO  
A DESCRIPTOR LANGUAGE**

Headings - 1 heading in SHL KABA	Headings - 2 headings in SHL KABA	Descriptors
	100 1.  a Andersen, Hans Christian  d (1805-1875)  x wpływ	100 1.  a Andersen, Hans Christian  d (1805-1875)
	150 ..  a Literatura polska  y 20 w.  x historia i krytyka	150 ..  a Literatura polska 150 ..  a Wpływ i recepcja
100 1.  a Claudel, Paul  d (1868-1955)  x kariera  x dyplomacja		100 1.  a Claudel, Paul  d (1868-1955) 150 ..  a Dyplomacja
151 ..  a Stany Zjednoczone  x roszczenia wobec Niemiec		151114 ..  a Stany Zjednoczone 151 ..  a Niemcy 150 ..  a Roszczenia wojenne115
	150 ..  a Śmierć  x w literaturze 100 1.  a Krasimski, Zygmunt  d (1812-1859)  x tematy, motywów	150 ..  a Śmierć 100 1.  a Krasimski, Zygmunt  d (1812-1859) 150 ..  a Tematy i motywów

The transformation of constructions expressing a relationship of dependency is identical to that used for juxtaposition, with one exception: apart from the two subjects, it is also necessary to name

114 B. Włodarczyk, J. Woźniak-Kasperek, *Język Hasel Przedmiotowych Biblioteki Narodowej...*, p. 136.

115 NLPD does not have the subject descriptor *Roszczenia wojenne* [14.06.2019]; it was proposed for the purpose of the transformation of SHL KABA.

the relationship itself. Where the relationship of juxtaposition is not defined in the course of the transformation, two independent elements are created. Where the relationship of juxtaposition is defined, its character is expressed in the additional element. With a relationship of dependency, it is always necessary to specify the type of relationship.

### CONCLUSION

The main reason subject heading languages are incompatible with modern library catalogues is a particular feature of their grammar, namely their pre-coordinating syntax. Our analysis of the methodological sources and a comparison with the effects of using MARC format to record data – a fundamental shift in the development of these languages – reveals that some things have been done correctly and others incorrectly. Our findings indicate that a diachronic analysis is needed in order to determine the direction in which the languages in question will develop in future. Such an analysis enables us to understand the current state of the principles and methodological considerations, so that they can be corrected as necessary.

This analysis of the evolution of ISLs represents a starting-point for further research. The post-coordinated language NLPD is built on the basis of a rich vocabulary inherited from its two predecessors: its direct predecessor SHL NLP, and SHL KABA, initially planned as an “auxiliary” language. One of the main principles of the creation of NLPD has been the goal of making its vocabulary close to that of natural language (Polish), and this has been put into practice right from the outset. However, the compatibility of that vocabulary on an international level requires separate investigation.

*Translated by Nick Ukhia*

### SUMMARY

The modern post-coordinated indexing language developed and used by the National Library of Poland since 2017 – the National Library of Poland Descriptors (NLPD) – replaces the traditional pre-

coordinated subject heading language of the National Library of Poland (SHL NLP). The vocabulary of NLPD is further enriched by transforming subject heading descriptions from the pre-coordinated subject heading language KABA (SHL KABA).

Transforming a pre-coordinated into a post-coordinated language primarily involves getting rid of the syntax used in the pre-coordinated language to rank the subject headings in a catalogue giving metadata in index form. The faceted presentation of the post-coordinated system allows the use of any desired combination of concepts.

The first stage in transforming the pre-coordinated languages in question is identifying the meanings expressed by the syntax (the position of lexical units determines their meaning) and recorded in MARC 21 format, originally created to meet the needs of card catalogues. For meanings generally referring to the subject matter of publications, we must distinguish elements such as simple, detailed subjects, implied subjects, the “aspect” (Polish: *ujęcie*) of subjects and different types of relationships between subjects. Correctly identifying these meanings enables us to move on to the second stage of the transformation process, which is recording those meanings as lexical units that can be used freely in NLPD.

**KEYWORDS:** National Library of Poland descriptors (NLPD), subject heading language transformation, pre-coordinated language, post-coordinated language, National Library of Poland (SHL NLP), KABA, MARC 21, syntax of pre-coordinated language, grammar of pre-coordinated language

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# IDENTIFYING SAMPLES OF HISTORICAL HANDWRITING VIA IMAGE PROCESSING WITH THE HELP OF CHARACTERISTIC FEATURES OF THE AUTHOR'S HANDWRITING

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The written word marks the boundary between prehistory and history. The invention of writing, which thrust the history of humanity into a new era of civilisation, meant that ideas that had previously only been transmitted orally - how to start a fire, how to make tools: ideas that were essential for civilisation - could be saved from oblivion. These ideas could now be recorded and thus remembered for longer than was possible by relying simply on human memory.

All written texts, from those using pictographic and ideographic writing systems to those using phonetic systems, are material products. They have been created by the human hand. The owner of these written texts is not always the writer, of course: not infrequently, as we know from history, a single mind has been able to control many hands. An example of this is the medieval scribes who, right across Europe, copied sacred works on behalf of the Catholic Church.

As Aristotle said<sup>1</sup>, writing – or, more precisely, the essence or „substance” of writing – has both form and matter. Its form is the letters left behind by the hand that wrote it and that carries the biomarker. These may be in a particular script, of course, such as Carolingian minuscule, bastarda or antiqua, but they will always contain an indelible trace of the specific writer who made the forms themselves. The substance, of course, is the contents of the text. The basic task of analysing the text is therefore to establish the authenticity and authorship of the document and its contents.

The first scientific discipline to take these questions as the subject of its research was palaeography. The word itself derives from the Greek *palaiós* „old” and *graphō* „to write”, so it is literally the study of „old writing”. The discipline of palaeography was born in the second half of the seventeenth century; its beginnings are attributed to the Jesuit Daniel Van Paperbroeck and the Benedictine monk Jean Mabillon.<sup>2</sup> However, it is worth noting that the earliest documented analysis of historical texts dates back to the times of the historian Herodotus in the late fourth or early fifth century B.C.<sup>3</sup> The aim of that discipline was to analyse texts (including questions of their authenticity and distortion), catalogue them and archive them. But it also aimed to study in a broad sense the development of writing as a historical process, from the majuscules of the early Middle Ages to the minuscule of the first incunables. Palaeography also gave rise to another scientific field: neography. As the name suggests, neography is the science of modern writing and is an extension of palaeography. Both fields are considered auxiliary sciences of history.

The problem of identifying a text in the partial or complete absence of information about its provenance or author, and questions of forgeries and falsification, concerned even by the earliest researchers. The tools at their disposal up until the beginning of

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1 R.J. Hankinson, *Cause and explanation in ancient Greek thought*, Austin 2001, pp. 96–100.

2 J. Szymański, *Nauki pomocnicze historii*, 6<sup>th</sup> ed., Warszawa 2001.

3 Herodotus, *The Histories*, transl. Robin Waterfield, Oxford 1997.

the twenty-first century were the „wiseman’s glass and eye”, the skills of the historian, and deductive, inductive and abductive reasoning. Information technology was still in its infancy. Information about the time and place of the origin of a text could be deduced from its contents, and thanks to the shape of the letters, the circle of possible authors could be narrowed down. Still, not infrequently the work had to be assigned to Gallus Anonymous, for example, or some other “pseudo-author”.

All over the world, archive materials and works of art, including manuscripts, paintings and sculptures from all periods - antiquity, the Middle Ages, the Enlightenment - have been lost, stolen or damaged in the turmoil of war, epidemics and natural disasters. When they did manage to make it back to their homes, they were often damaged, had parts missing or were now entirely anonymous. Yet the value of these items, in simplistic terms, depended on two parameters: the hand that made them, and their contents. For example, Rembrandt’s “Self-portrait in a Cap”<sup>4</sup> from 1630 and his „Beggar Seated Warming His Hands at a Chafing Dish”<sup>5</sup> from the same year are worth astronomical amounts in the world of culture due to the sum of Rembrandt’s achievements during his lifetime and his fame. If their authorship were unknown, a non-expert would have to class them as anonymous and therefore worthless. Indeed, it is safe to say that historical materials exist in collections all over the world which, due to the impossibility of identifying them, remain nameless and, in a certain sense, worthless.

Working with written texts, including identifying them by hand and determining their authenticity, is the speciality of the graphologist. It requires expertise and is expensive and laborious. A graphologist, while performing an analysis of a manuscript, uses another sample of handwriting, and through analysing the

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- 4 Rembrandt van Rijn, *Self-portrait in a Cap, Wide-eyed and Open-mouthed*, 1630, Scientific Library of the PAAS and the PAS in Cracow, Graphic Collections Department, BGR.008347.
  - 5 Rembrandt van Rijn, *Beggar Seated Warming His Hands at a Chafing Dish*, 1630, Scientific Library of the PAAS and the PAS in Cracow, Graphic Collections Department, BGR. 004086.

same letters in both sources, they determine whether they have been written by the same person. In addition, the human factor must be taken into account. Few archives, libraries and scientific institutions can afford the services of a graphologist. Here, however, as Thomas à Kempis wrote – a quote often cited by C.S. Lewis – “the highest does not stand without the lowest”. Palaeography, neography and their legacy have given rise to various disciplines within information technology that deal with the analysis of written texts, including pattern recognition, computer vision and template matching. Thanks to the huge development of electronics at the turn of the century, computer science offers many possibilities, including: the recognition of printed texts (commonly known as “optical character recognition” or OCR), not just from scans but from digital photographs; the identification of pieces of music from fragments lasting just a few seconds; the identification of human faces by digital cameras in real time; and free navigation for cars using any modern smartphone.

Although the possibilities offered by machine-learning are growing constantly, they have not yet solved all our problems. In one area, however, they have made major progress. In the second decade of the twenty-first century, the field of pattern recognition has been increasingly successful in solving complex problems which, just a few years ago, were impossible due to insufficient computing power and the use of an overly complex mathematical model. Today, most of these problems can be solved in real time with the help of deep neural networks.

The digital analysis of written texts can take place either offline or online. The offline, or traditional approach involves the analysis of texts written on papyrus, parchment or paper. There is no contact with the author of the document, only with what they have written. The more modern, online approach involves the use of electronic devices – tablets, touchscreens, styluses, digital pens – to record not only the contents but also the pressure exerted during the writing process, the trajectory of the writing instrument, the writing time and other parameters that traditional analysis

does not take into account. In this study we are interested in the digital representation of historical manuscripts, so we use offline analysis to try to recognise the contents of texts. However, we are also interested in a second aspect, namely that is, identifying the handwriting in the sample.

One should take into account another aspect - the static analysis of writing distinguishes two methods of analysis: through matter and form and through form only. In the first approach, we analyse the content of the text, divide it into particular letters, and then we analyse the letters in both samples to discover differences and similarities. To do so, the machine needs to be able to read the content of the samples before it analyses them. In the second approach only the form is used to retrieve the author's biomarker and then the mathematical models of both samples are analysed.

The aim of this article is thus to introduce the reader to the subject of digital manuscript analysis. We begin with a theoretical description of a prototype for a system for identifying handwriting samples; this section is based on the author's doctoral thesis,<sup>6</sup> written at Warsaw University of Technology and defended in 2019. Warsaw University of Technology is the only institution in Poland dealing with the recognition and identification of historical handwriting samples using image processing methods. We follow the theoretical description with a description of what the system can do. The system allows us to analyse similarities between writing samples from a micro scale - strokes (components of letters), words and paragraphs - to a macro scale, that is entire manuscripts, including codex collections. When tested with a collection of Latin codices from the Middle Ages from the digital repository Polona.pl, owned by the National Library of Poland,<sup>7</sup> the system correctly identified the authors of handwriting samples almost a hundred per cent of the time. The success rate was similar for an analysis of the database of contemporary manuscripts in English of the

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<sup>6</sup> J.L. Pach, *Identyfikacja autora rękopisu łacińskiego z wykorzystaniem metod przetwarzania obrazów*, unpublished doctoral thesis, Warsaw University of Technology, 2018.

<sup>7</sup> MS 12511 II, MS 3307 II, MS BOZ 36, 1197 V MS.

Computer Science Institute at the University of Bern (the Modified database of the Institute of Informatics and Applied Mathematics, or MIAM),<sup>8</sup> part of research carried out to demonstrate the potential of the prototype.<sup>9</sup> The system was then successfully used to analyse the text of the seventeenth-century Chronicle of Father Stefan Ranatowicz,<sup>10</sup> which demonstrate his calligraphic artistry, and to identify samples of writing by two other authors who added to the Chronicle after his death, namely Father Michał Aquilin Gorczyński and Father Krzysztof Piasecki.<sup>11</sup>

The architecture of the new system is shown in Figure 1. It consists of four main stages: *Pre-processing*, *Text segmentation*, *Extraction of handwriting features* and *Classification*. Comparing these four stages to text analysis, we could say that the first two stages are like the introduction, the *Extraction of handwriting features* is like the development, and the *Classification* is like the conclusion.

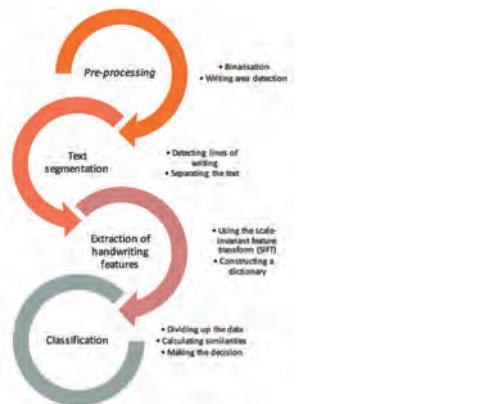


Fig. 1. Architecture of the system for identifying samples of historical handwriting via image processing with the help of characteristic features of the author's handwriting.

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- 8 U.-V. Marti, H. Bunke, „The IAM-database: an English sentence database for offline handwriting recognition”, *International Journal on Document Analysis and Recognition*, 2002, 5/1, pp. 39–46.
  - 9 This base is available: Research Group on Computer Vision and Artificial Intelligence - Computer Vision and Artificial Intelligence (heia-fr.ch) [accessed 04.12.2020].
  - 10 S. Ranatowicz, Casimiriae civitatis, ms BJ 3742 III.
  - 11 K. Łatak, M. Pęgier, J. Pach, *Z problematyki kodykologicznej i paleograficznej Kroniki Stefana Ranatowicza*, Warszawa 2019.

Before we move on to the first stage, we should explain briefly what is meant by a „digital image” in “computer science. Historians, in their work, draw on the phenomenon of „subtractive synthesis”, while computer scientists draw more on „additive synthesis”. Both refer to the phenomenon of colour mixing (see Figure 2). Subtractive synthesis occurs when paints or inks are mixed; it is used in today’s printing technology. Thus, to get green ink, you mix blue and yellow. In theory it should be possible to obtain black paint by mixing all the different-coloured paints together. In practice, however, the black colour in printing is placed in a separate container in order not to use up the coloured inks unnecessarily. Additive synthesis is based on the theory of visible light. The colour white contains all the primary colours. This can be seen by splitting visible light with a prism, for example, or in the natural phenomenon of a rainbow.

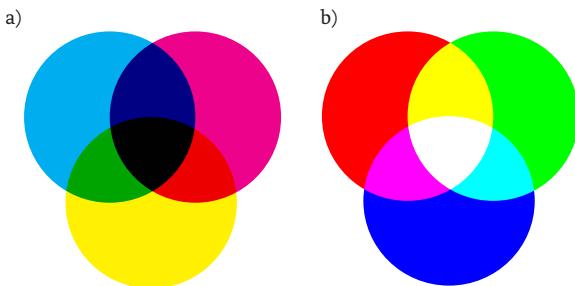


Fig. 2. a) Subtractive synthesis; b) Additive synthesis.

In the twenty-first century, additive synthesis is replacing subtractive synthesis. It is used in all electronic devices that emit visible light, such as monitors, smartphones, TV sets and tablets. These devices emit beams of red, green and blue light, which at maximum intensity together create white light. In fact, many “colour spaces” are used in recording digital images, but here we will only refer to those commonly used in additive synthesis, namely red, green and blue, or the “RGB colour space”. In order for one pixel on the screen to be filled with colour, three numbers are

needed, describing the percentage of intensity from zero to 100 per cent of each the three components (red, green and blue). Every colour can be obtained by combining these three numbers. The entire digital image or “raster image” made up of pixels is represented on the computer in the form of a single, two-dimensional matrix for each component. This, in simple terms, is the form in which images are stored in BMP, JPG and other file types.

Additive synthesis has one major advantage when it comes to image analysis. The colour white is a number other than zero, while the colour black is the absence of light, and hence zero. This means that everything other than zero can be manipulated and transformed (whereas multiplying anything by zero always gives zero). So when processing the image, we try to present the important information for analysing the image in white, and irrelevant information, including noise, in black.

The first stage in our system is the *Pre-processing*. This aims to separate in the digital image any information that is not needed for the analysis of the handwriting - dirt, gaps, notes by copyists, margins, holders used to keep the manuscript straight during digital photography, illuminations (see Figure 3), initials - from the information that is crucial for us, that is, the actual text, written in ink.

This first stage actually consists of two smaller steps. The first is the *Binarisation*, which involves converting the colour image into a black-and-white image, in which the background is black (with the binary value zero) and the ink is white (with the binary value one; see Figure 5b). In this case, the input was a manuscript that had been professionally digitised; before the photograph was taken, the manuscript was illuminated with uniform, non-directional light. If the photograph is taken without uniform light, the result will not be as good, as shown in Figure 4b. To achieve the desired effect (Figure 4c), it is necessary to use the more advanced method that we specially developed for our system, which we call “Gaussian binarisation”. In simple terms, in order to assess whether a pixel should be white, Gaussian binarisation not only uses sta-

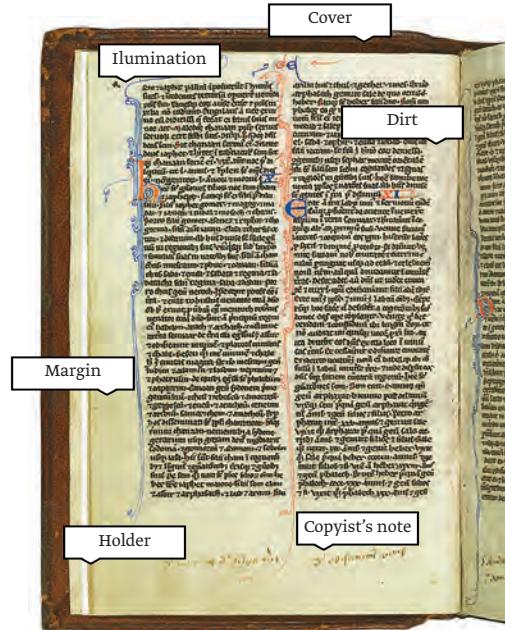


Fig. 3. Information not needed for the handwriting analysis.

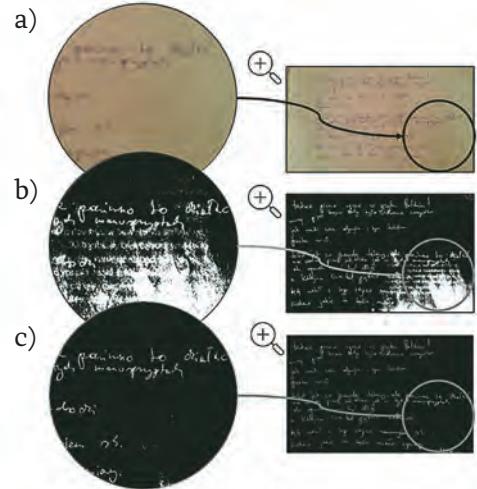


Fig. 4. a) Binarization of a photograph of a manuscript taken with a digital camera without professional lighting; b) Otsu binarization of a); c) Gaussian binarization of a)

tistical data from the whole image, as in Otsu binarisation,<sup>12</sup> but also contextual information; in other words, the value of the pixel depends on the colour of the neighbouring pixels.

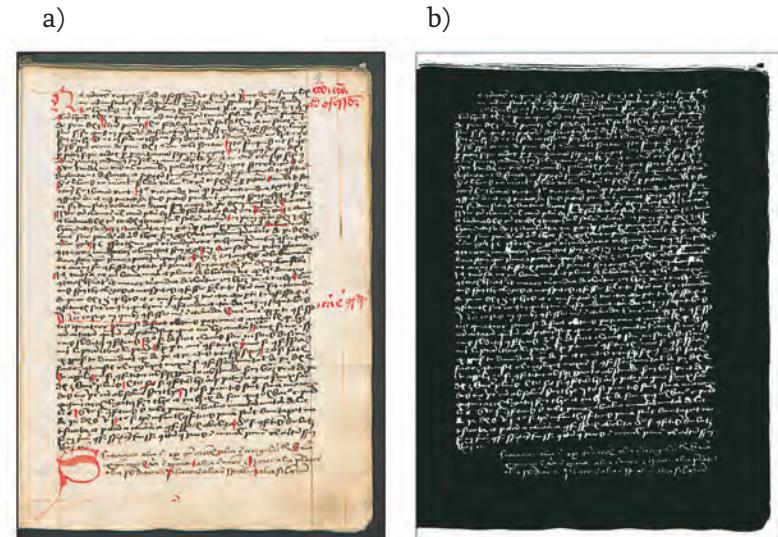


Fig. 5. a) Manuscript in colour; b) Binarized image.

However, looking at Figure 5b, it is clear that we now have to deal with a new kind of noise: the edges of the sheets of paper have been treated as ink, as has the pagination in the upper right-hand corner, added by someone other than the author of the manuscript. These elements need to be eliminated.

We do this in a second step, which we call *Writing area detection*. Anyone looking at the manuscript, without being able to read it, can easily determine the area covered by the writing and divide it up into different lines. After closer analysis they will be able to group fragments of letters into letters, and letters into words. As mentioned above, to a computer, a picture is only a set of num-

<sup>12</sup> S.S. Reddi, S.F. Rudin, H.R. Keshavan, “An optimal multiple threshold scheme for image segmentation”, *Systems, Man and Cybernetics, IEEE Transactions*, 1984, SMC-14/4, pp. 661–665.

bers in a certain order; we therefore need to tell the computer to perform all the necessary operations which a human being would perform intuitively, in the form of a series of actions. First, the system must identify groups of pixels within fragments of letters, which we call “connected components”, and place them within the smallest possible “bounding box” (see Figure 6).

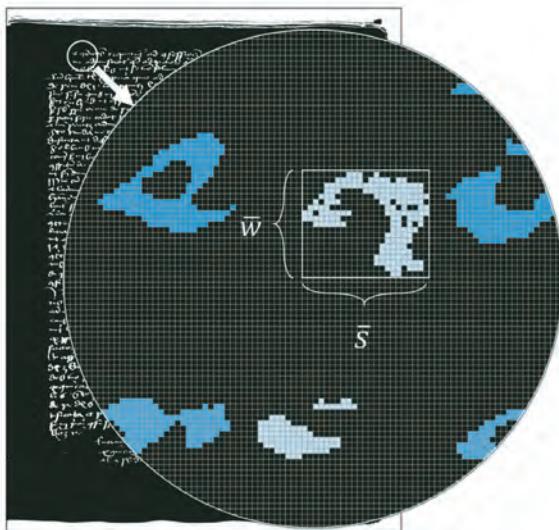


Fig. 6. Detecting connected components and determining their average size.

This makes it possible to determine the approximate dimensions of the letters in the manuscript. Thanks to this procedure, anything that is too small or too big compared to the letters can be rejected at this stage. The algorithm used here is based on the RLE (run-length encoding) method of encoding data series. To illustrate this, we can use the abstract word *aaabbccaaabbbbbb* as an example. This can be written in pairs of characters consisting of the number of uninterrupted occurrences of the letter, followed by the letter itself, thus: *3a,2b,1c,3a,10b*. As the binary image is a matrix in which each row (or column) consists of a series of zeros and ones, the sequence *110111000101100111*, for example, could be written, using the same methodology, as: *21,10,31,30,11,10,21,20,31*.

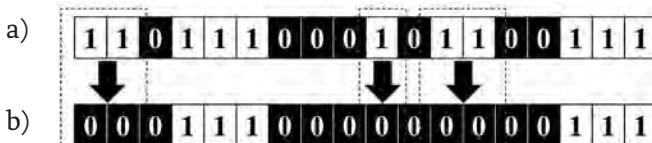


Fig. 7. a) A binary vector; b) The result of replacing a sequence of binary numbers of ones with zeros.

What is the significance of this? In the binary sequence shown in Figure 7a in graphical form, any sequence of binary numbers - for example, those that consist of fewer than three ones - can be replaced by black zeros. The result is Figure 7b. In simple terms, this procedure makes it possible to remove most of the elements that do not form part of the written text under analysis. The operation is performed horizontally and vertically on the input image. The result of this process is shown in Figure 8.

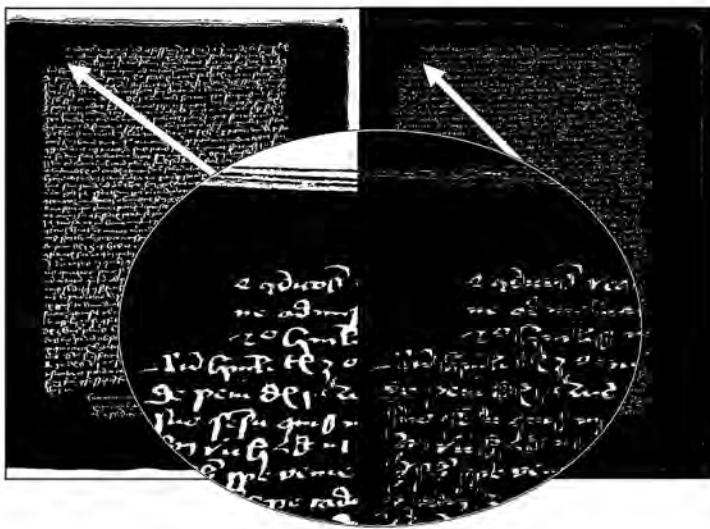


Fig. 8. The binary image before and after replacing a sequence of binary numbers of ones with zeros.

As can be seen, the vast majority of the white area that did not form part of the text has been removed. The text now has bits missing here and there at the corners, but the computer is able to reconstruct these and create a contiguous area containing the text to be

analysed, which we call the „binary mask” (see Figure 9b). The input image and the binary mask are the same size, so superimposing one on top of the other gives us the final image, in which all the unnecessary information has been removed and only the parts written in ink which we are interested in remains (see Figure 9c).

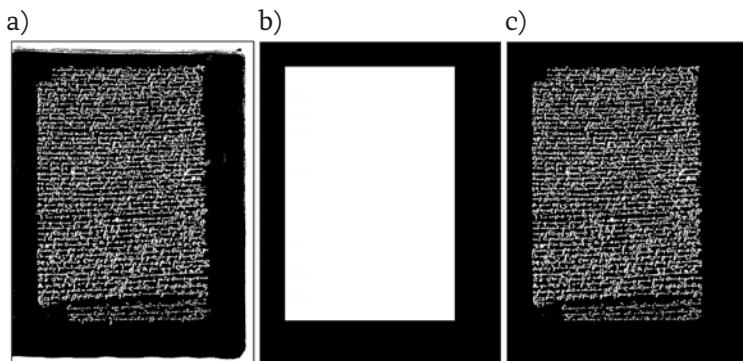


Fig. 9. a) Binary image of the manuscript; b) Detected area of written text;  
c) Manuscript a) with all unnecessary information removed based  
on the detected area of written text.

Having been pre-processed in this way, the image can now be used as the input for the second stage in the process, the *Text segmentation*. Like the *Pre-processing* stage, this consists of two steps. The first is *Detecting lines of writing*, the second *Separating the text*. Here, we must touch briefly on the characteristics of Latin manuscripts from the Middle Ages. For a human being, identifying a line of writing is easy, even if the line slopes upwards or downwards; for a computer, on the other hand, this is one of the most difficult parts of the process.

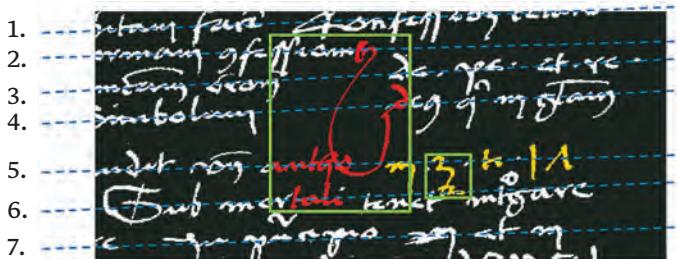


Fig. 10. Example of overlapping letters in a manuscript.

In the Middle Ages codices were a luxury commodity, as were the parchment and ink used to write them. As a result the text was often written very close together, so as to increase the amount of text that could fit on one sheet of parchment. Often parts of the text overlapped (Figure 10). To a computer the part marked red, which covers five lines of text, appears to form a single element; to a human being it is clear that this is due to overlapping letters. Unlike today, the scribe did not rest his hand on the writing material but rather drew the quill across the parchment. As a result the text slopes downwards, forming a curve.

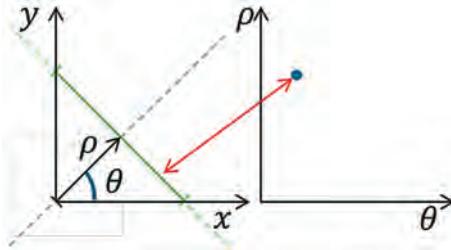
To correctly segment the manuscript into lines of text for further analysis, the computer must detect any areas that are connected to each other and divide them up, assigning them to the correct lines of text. We do this with an algorithm based on an improved Hough transform from 2015.<sup>13</sup> Once again, the words of Thomas à Kempis are fitting here: “the highest does not stand without the lowest.” The Hough transform is a modified form of the Rodon transform from 1917, patented by Hough in the United States on December 18, 1962 and used to detect lines in an image. Now widely used in the field of computer vision, this transform is based on the system of polar coordinates successfully used by the Greek astronomer Hipparchus on the island of Rhodes in the second century B.C.<sup>14</sup>

The concept is based on the idea that any line in the Cartesian coordinate system can be written as a point in the polar coordinate system and vice versa, that is, that any point in the polar coordinate system can be written as a line in the Cartesian coordinate system. As we know, any straight line - in other words a linear function - can be expressed by the formula , where  $a$  is the slope and  $b$  is the y-intercept. If  $a$  is greater than zero, the function will be increasing, and if  $a$  is less than zero, the function will be decreasing.  $b$  is the value at which the function intersects with the Yaxis.

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<sup>13</sup> J.L. Pach, P. Bilski, “A robust binarization and text line detection in historical handwritten documents analysis”, *International Journal of Computing*, 2016, 15/3.

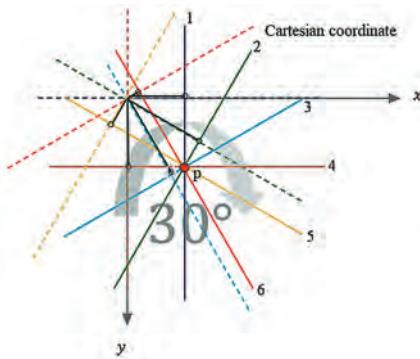
<sup>14</sup> C.M. Linton, *From Eudoxus to Einstein: A History of Mathematical Astronomy*, New York 2004, p. 52.



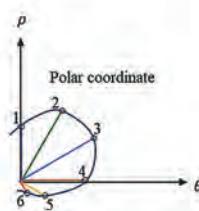
**Fig. 11.** Transformation of a straight line (green) from the Cartesian coordinate system to the polar coordinate system (blue dot).

“Note the solid green segment of the dotted green line on the left of Figure 11. First, we draw from the origin of the Cartesian coordinate system a line that crosses this solid green segment at right angles (the grey dotted line, one segment of which is black with an arrow on the end). The length of the black segment is the value of the first parameter  $\rho$ . The angle which the black line forms with the  $X$  axis is the second parameter  $\theta$ .<sup>15</sup>

a)



b)



**Fig. 12.** Rotation of a line around a red point  $p$ , and its representation in the polar coordinate system.

The practical implications of this are illustrated in Figure 12. Here, we need to refer to another algebraic correspondence, name-

15 Calculated according to the formula:  $x \cdot \cos(\theta) + y \cdot \sin(\theta) = \rho$ .

ly that in the Cartesian system an infinite number of lines (such as lines 1, 2, 3, 4, 5 and 6) can be drawn through any point ( $p$ , marked in red in Figure 12a). It is also possible to draw a line through this point parallel to the Y axis (line 1, purple) and create for it a black segment as we did above (lying along the dotted purple line in Figure 12a) to obtain its length  $\rho$  and the angle  $\theta$  between it and the X axis. We then transfer these values in the form of a point to the polar coordinate system. Next, we rotate the purple line clockwise, for example by one degree (or 30 degrees in the case of Figure 12b), to obtain the green line 2. Proceeding in the same manner, marking one point in the polar coordinate system for each line, we obtain the graph shown in Figure 12b. The smaller the rotations, the bigger the number of lines, and so the more points there are in the polar coordinate system. Together these points form a curve.

This is illustrated in Figure 13. On the left-hand side, in the Cartesian coordinate system, we have three points: point 1 is yellow, point 2 brown and point 3 red. On the right-hand side, in the polar coordinate system, these three points correspond to three curves: yellow, brown and red. The illustration shows that the points where the curves intersect on the right correspond to the straight lines on the left. Thus the red and brown curves on the right intersect at a blue point; we already know that points on the right correspond to lines on the left, so on the left we find a blue line on which the red and brown points lie.

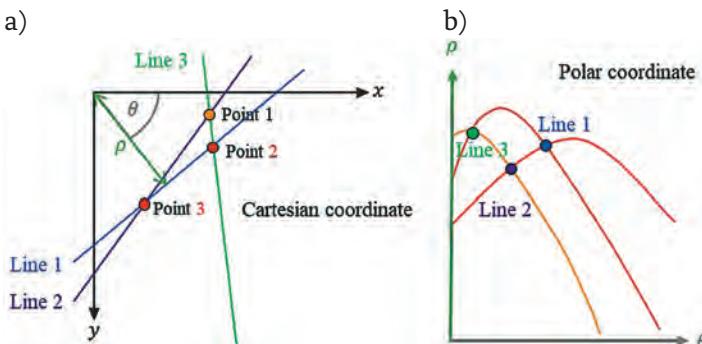


Fig.13. Conversion of three points in the Cartesian coordinate system to curves in the polar coordinate system.

Thanks to this correspondence it is possible to locate written lines in a text using points in the Cartesian coordinate system. In addition, however, we must split this binary image (from which noise has been removed and which now only contains information about the text itself, written in ink) into horizontal sections. We then select only those points which hypothetically lie in the centre of the line of text in question, as illustrated by the red line S in Figure 14.

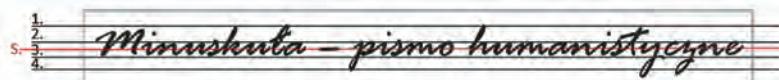


Fig. 14. Minuscule handwriting sample split up using four horizontal lines, with the centre marked.

To obtain these points for the whole text it is necessary to recalculate the sizes of all the objects in the image, as in Figure 6, as the average height and width will have changed significantly after removing the non-text elements. We can divide the remaining text into three groups. The first group contains characters similar to the average size of the elements in the image; this will mainly be fragments of letters. Only this group will be needed for further analysis. The second group contains elements which are significantly larger than the average size; this will include both initials and blocks of connected text, such as the part marked red in Figure 10. At a later stage these will have to be divided up appropriately. The third group contains punctuation marks and diacritics that are significantly smaller than the average size, most often full stops, commas and the like. Figure 15 is a graphic illustration of this division of the text into three groups. The smallest elements will be attached to the letters closest to them in the final part of the *Text segmentation* stage.

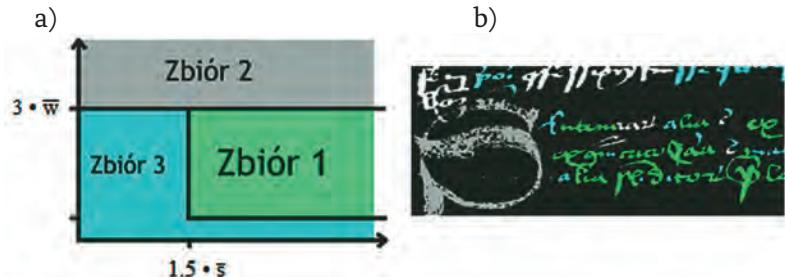


Fig. 15. Graphical illustration of the division of the text into three groups.

Accordingly, we only take green objects (see Figure 15b) into account when looking for lines of writing using the Hough transform. Modern digital representations of manuscripts are usually very high resolution so the fragments of letters often consist of a huge number of pixels, as can be seen in Figure 6. The line  $S$  in Figure 14, which is what we are looking for, essentially cuts through the middle of them. So in order to avoid unnecessary calculations by the computer, which might introduce false information, the green objects are divided into blocks and one central point is determined for each block, as shown in Figure 16.



Fig. 16. The points used in the procedure for identifying lines of writing are marked red.

In simple terms, if enough points lie on the same straight line, the Hough transform will identify it; if not, an additional algorithm is needed to highlight the information for the Hough transform. This solution is not ideal but thanks to this step it is possible to identify a potential set of lines of writing for the entire manuscript. Often this set is incomplete, so another step is needed to reconstruct and eliminate any redundant lines of writing. Figure 17 shows the final result of the *Detecting lines of writing* step; red boxes are used to show where different letters overlap. In order to divide the text into lines of writing we need to separate these overlapping letters and assign them to the correct line.

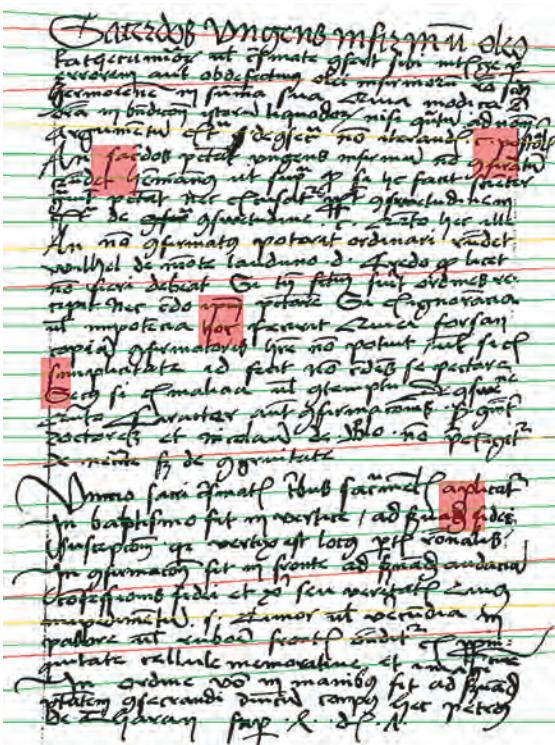


Fig. 17. Lines identified by the traditional method are marked red, those marked by our improved version are marked green. Lines identified by both methods are marked yellow. Red boxes show where letters overlap across more than one line of writing.

Thanks to the fact that we have a complete set of the lines of writing, we can now move on to the second step in the *Text segmentation* stage, namely *Separating the text*. Having located all the lines of writing, the computer checks whether there are any fragments of text linked to each other which pass through at least two lines of writing. These fragments must be divided up, which requires a process known as “skeletonisation”. Skeletonisation involves reducing the image by making successive “passes”. This is a process akin to sanding something down on each side, step by step, until you get the thinnest object possible, such that if you sanded it down any more it would disintegrate. This is illustrated graphically in Figure 18.

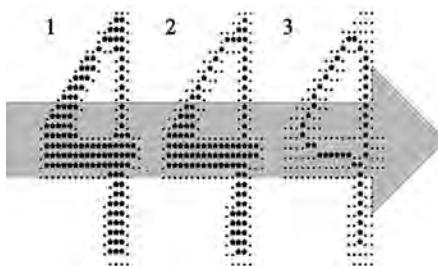


Fig. 18. Three passes of skeletonization.

After obtaining these skeletonised images of fragments of the text, the points of intersection are removed so that the fragments can be assigned to the nearest lines of writing that intersect them. These points of intersection are indicated with red circles in Figure 19c.

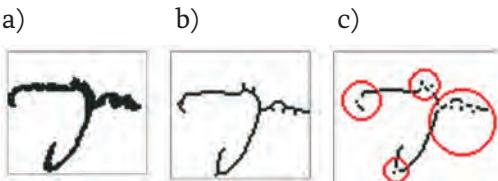


Fig. 19. a) Fragment of text; b) Skeletonised image of fragment a); c) Removal of intersection points in b)

The remaining parts (pixels) that were removed during skeletonization, and the intersection points, are then replaced and attached to fragments that have already been assigned to lines of writing, as in Figure 20. This process is commonly known as “colouring”.

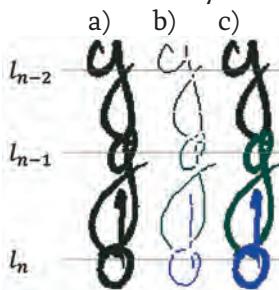


Fig. 20. Colouring a fragment of text: a) Original fragment; b) Skeletonised image of fragment with intersections removed; c) The fragment coloured, i.e. assigned to the correct line of writing.

Figure 21 gives an example of the result of the first two stages, the *Pre-processing* and the *Text segmentation*.



Fig. 21. Graphical illustration of the detection and colouring of lines of writing by the system.

A human being looking at the manuscript would intuitively divide the lines of writing up further into sentences, then words, then letters made up of strokes. However, here it is not necessary. In our system it is not important *what* is written but rather *how* it is written. The basic unit of writing still big enough to allow efficient recognition of handwriting samples is the individual line. The father of modern linguistics, Ferdinand de Saussure, born at the be-

ginning of the second half of the nineteenth century, already had a strong suspicion about how the human brain functioned, long before the first computer was built. His definition of a sign is as follows:

“The linguistic sign unites, not a thing and a name, but a concept and a sound-image. The latter is not the material sound, a purely physical thing, but the psychological imprint of the sound, the impression that it makes on our senses.”<sup>16</sup>

De Saussure noted that the human brain must contain a template for each sign which people use intuitively and if necessary can reproduce - a kind of memory cell in which the set of distinctive features necessary for identifying a sign are stored. As a result the brain can tell whether the written sign matches the template or not. For example, in theory it is not difficult for someone who knows the Latin alphabet to identify a capital letter *A*. But when that person writes the letter *A* themselves, it will not only contain these distinctive features but also certain features characteristic of the writer. The characteristic features of their handwriting may include the use of italics, the thickness of the writing, how round certain letters are - features that are characteristic for them and them alone, features that are unique, a kind of marker.

The same applies to all the skills that an individual has mastered in the course of their life: they will have learned and remembered those skills in a certain way. Everything that they do, they do according to a template which is limited by their own physical condition - from how they write (how often they use certain words, their syntax, their use of anachronisms) to how they walk or the body language they use. On this basis an intelligent computer system is able to identify a person from a video recording of them<sup>17</sup> or a handwriting sample - by how they draw the upward stroke of the letter *b*, for

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16 F. de Saussure, *Course in general linguistics*; transl. Wade Baskin, New York 2011, p. 66.

17 Y. Pratheepan, P.H.S. Torr, J. V Condell, G. Prasad, *Body Language Based Individual Identification in Video Using Gait and Actions*, Berlin, Heidelberg, 2008.

example. Human beings often subconsciously try to reconstruct the patterns stored in their brain. This is the basis for how intelligent computer systems work: they are able to capture these patterns. Indeed, those studying the psychology of handwriting go a step further and claim to be able to identify the health, emotional state or age of the writer on the basis of their handwriting.

To sum up, after the initial image processing and removal of everything that is unnecessary for further analysis of the handwriting, the text is segmented up into lines of writing. This allows us to move on to the next stage in the system, the *Extraction of handwriting features*. This stage is again divided into two steps. The first step is *Using the scale-invariant feature transform (SIFT)*, in which all the individual features of a particular writer's handwriting are extracted on the basis of a sample. The second is the construction of a dictionary containing digital representations of all the samples of handwriting that have been analysed.

The third step involves the technique known as "template matching", which includes a set of algorithms that form the basis for the complex transform SIFT from the field of digital image processing. This itself is a specialised piece of software/programme for identifying characteristic features or "keypoints" in images. SIFT is used in a wide range of applications besides the analysis of handwritten and printed texts, such as object recognition and tracking, building maps, robot localisation, creating panoramic images, reconstructing three-dimensional objects, identifying human gestures and adjusting images in films.

To explain how traditional template matching works, we first need to define two types of image: "templates" and "scenes" (see Figure 22). The task is to identify where a template occurs on a scene. If a template occurs, the system should determine its position; if it does not, the system should send an appropriate message to the user.

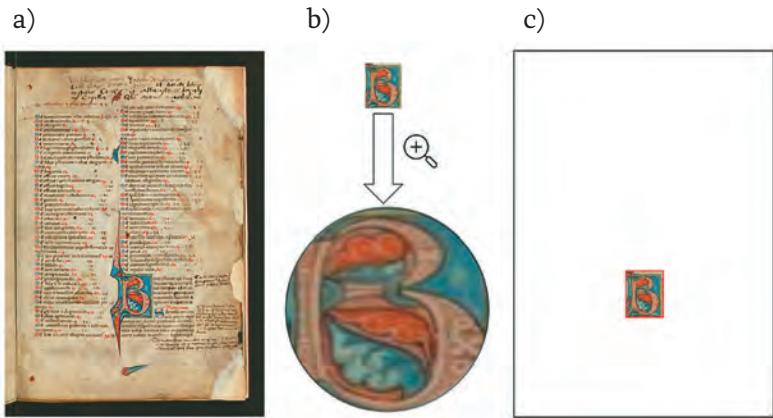


Fig. 22. a) Digital image of a Latin manuscript,<sup>18</sup> forming the scene; b) Digital image of an initial and magnified version of the image; c) The detected template on the scene.

Figure 23 illustrates how the computer finds a template on a scene, showing the representation of the image and its scale. The image has been enlarged three times (1-3) so that we can see the beginning of the binarised area highlighted in the red box.

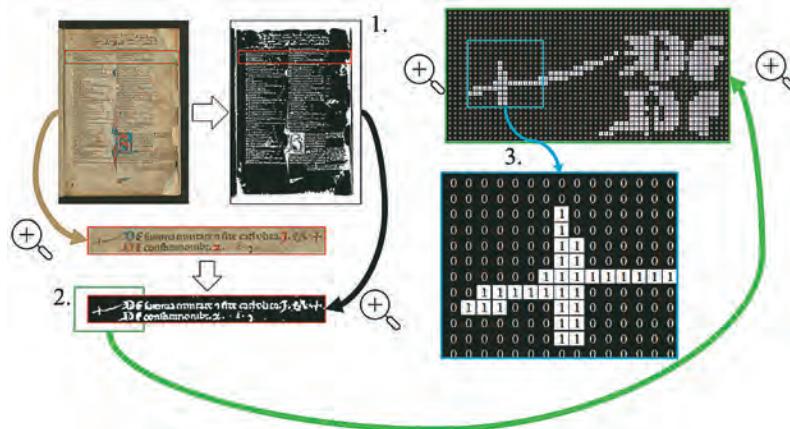


Fig. 23. Binarisation of a Latin manuscript and graphic representation of the binary matrix of part of it.

To illustrate the size of the digital image of the Latin manuscript: the image is 637x898 pixels, and it represents just ten per cent of the original image taken from the holdings of the National Library of Poland. That gives us a total of more than half a million pixels. The template we are looking for is 90x112 pixels, which is more than 10,000 pixels. In terms of scale, this is like looking for tyre tracks on a football field. The computer applies the template to the top left-hand corner of the image, touching the upper left-hand edges of the scene, and then calculates the cross-correlation between the template and the overlapping part of the scene. The cross-correlation value is the percentage of the images that overlap. The computer saves this value, then moves the template one pixel to the right and repeats the calculation. When it reaches the right-hand edge of the image, the template returns to the left-hand edge, one pixel further down. It repeats this until the algorithm calculates the set of correlation values for all matches of the template to the scene; this is known as the „correlation matrix”. The algorithm then searches through the correlation matrix and if it finds a value close to 100 per cent, then it has determined the exact coordinates of the object on the scene.

Clearly this process involves a huge number of calculations. Moreover, the method is somewhat flawed: the algorithm will not work if the template is rotated by even a few degrees or if it is of a different scale to the object on the scene. In 1999, to overcome these limitations David Lowe developed the complex SIFT algorithm,<sup>19</sup> a scalable transform of the features of an image.

The SIFT algorithm works on the same principle as human sight. Image processing is analogous to the perception of stimuli by a human being suffering from short-sightedness but wearing corrective glasses, thanks to which they can see clearly. If they spend enough time in the company of a second person, their brain will build a detailed template pattern of that person on the basis

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<sup>19</sup> D.G. Lowe, “Distinctive image features from scale-invariant keypoints”, *International journal of computer vision*, 2004, 60/2, pp. 91-110.

of their appearance, their body proportions, height, the shape of their limbs and other distinguishing features (for the sake of simplicity we refer only to visual stimuli). If the short-sighted person - this time without their glasses - meets the other person again it is highly likely that they will still be able to pick them out in a crowd. This is because the above-mentioned features will still be visible to them, even if the image is unfocused; the proportions of the person's body will not change even if the person turns or moves closer or further away from the viewer.

Figure 24 illustrates this. With the right glasses, the short-sighted person will see a sharp image, rich in detail, as represented by the blue line 1. If the glasses are too weak the person will see less clearly, as represented by the orange line 2. The remaining lines show the results for increasingly weak glasses, right down to no glasses at all. However, it is worth noting that even without glasses some of the individual peaks (specific features), marked with vertical dotted lines, are still visible.

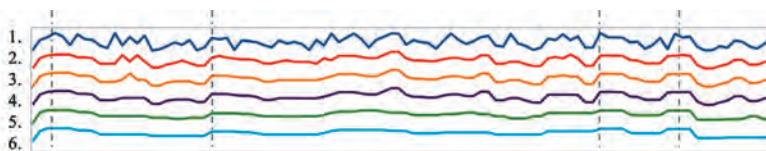


Fig. 24. A blue line smoothed by median filtering (2-6).

SIFT comprises five stages. The first stage is generating auxiliary images - known as the pyramid - which are needed to enable independence from scale and to transform them into Differences of Gaussians (DoGs). The second stage is detecting points of interest (local extremes) in these images as a set of potential keypoints. The third stage is selecting keypoints, and the fourth finding the value of the following parameters for the keypoints: location coordinates, orientation and scale. The fifth and final stage is computing a descriptor vector for each keypoint.

The first stage is the pyramid. This consists of the original image, followed by a copy of the image half its size, followed by an-

other copy half the size of that, and so on (see Figure 25). Once a pyramid has been constructed, several copies of it are made and then „blurred”: each copy has a higher blurring coefficient in order to hide certain details and bring others into prominence, depending on the scale.



Fig. 25. Image reduction and blurring by using an increasing blurring coefficient.

This simulates the example that we gave above of the short-sighted person. Having created copies of the images in different sizes and with different degrees of focus, these images are now used to create DoGs (see Figure 26). This involves creating a new image using the differences in values between two images of the same size but with different levels of blurring. In this newly created image there will be peculiarities (local extremes). We then need to search the DoGs for potential keypoints. The clearest peculiarities belong in the initial set of keypoints, that is, the characteristic features of the input image.

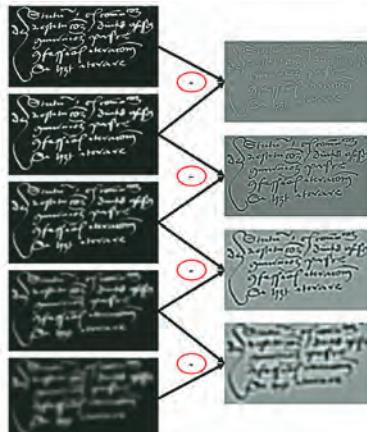


Fig. 26. Differences of Gaussians (DoGs) for one dimension.

A process of selection follows, removing candidates where the contrast is too low or which are located on the edges of the image being analysed. This gives us the final set of keypoints, which can be shown as vectors - the red arrows in Figure 27. Each arrow has a specific length (scale), direction (orientation) and specific coordinates.

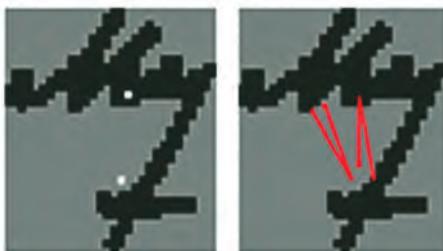


Fig. 27. a) Coordinates of keypoints; (b) Direction and length of keypoints.

While the coordinates are important when looking for the distribution of keypoints relative to each other in the image, they are unnecessary when it comes to recording features of handwriting. This is because recording features of handwriting is a kind of statistical operation concerning the distribution of the directions and sizes of keypoints. These are recorded in the form of two “frequency of occurrence” charts for a specific orientation and scale. An example for a single handwriting sample is in Figure 28.

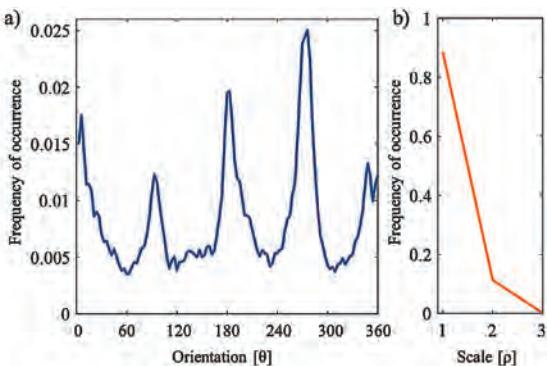


Fig. 28. Graphic representation of a single handwriting sample in the form of two charts: (a) orientation; (b) scale.

If a digitised handwriting sample is already available, we can now move on to the second step in the *Extraction of handwriting features* stage, namely *Constructing a dictionary*. Each individual handwriting sample is saved as a single vector, containing the scale and orientation values. Next, we create a database of all the handwriting samples to which the system has access. Let us take, for example, the digital representation of the features of the handwriting samples from the *Chronicle of Father Stefan Ranatowicz*. Figure 29 shows the first 200 parchment sheets<sup>20</sup>.

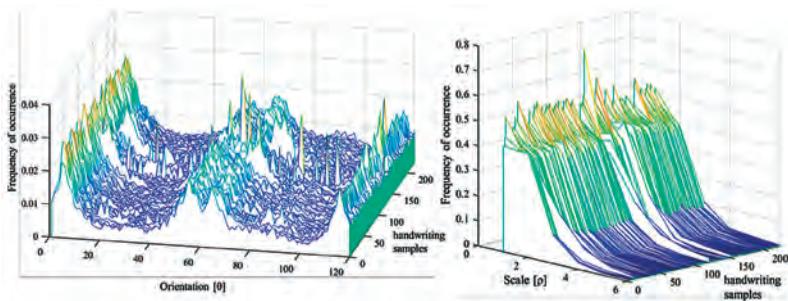


Fig. 29. Graph showing handwriting samples from 200 parchment sheets from the Chronicle of Father Stefan Ranatowicz<sup>21</sup>.

The irregularities, which are visible to the naked eye, clearly relate to handwriting samples from the other writers, namely Father Michał Aquilin Gorczyński and Father Krzysztof Piasecki.

The final stage in the system is the *Classification*. This is divided into three steps: *Dividing up the data*, *Calculating similarities* and *Making the decision*. To verify the accuracy of this final stage we need to divide up the handwriting samples in the dictionary that we have created into a “training dataset” and a “validating dataset”, each of the appropriate size.

In this paper we divide up the data using a process of cross-validation. This involves dividing up the data piece by piece into training and validating datasets. In one sample, the label indicating

20 S. Ranatowicz, Casimiriae civitatis, MS BJ 3742 III.

21 K. Łatak, M. Pręgier, J. Pach *Z problematyki kodykologicznej i paleograficznej..., op. cit.*

the author is hidden. The computer is then instructed to find the sample which is most similar to it among all the other samples. The computer finds a possible candidate and says what it thinks its label is. If the computer gives the correct label, the identification is considered correct; if not, it is considered incorrect. The same is then done for all the other samples of writing in the dictionary, one by one. The accuracy of the classifier is the arithmetic mean of all the decisions it takes. This method allows us to determine the effectiveness of the classifier regardless of the specific dataset, and also makes the results objective.

Figure 30 presents seven handwriting samples (marked light grey). In the first step, the label of the first sample is hidden. As a result, the sample goes in the validation set (marked orange) and the rest of the samples go in the training dataset (marked dark grey). In steps 2 to 7, the next samples are treated the same way, until all the handwriting samples have been used up.

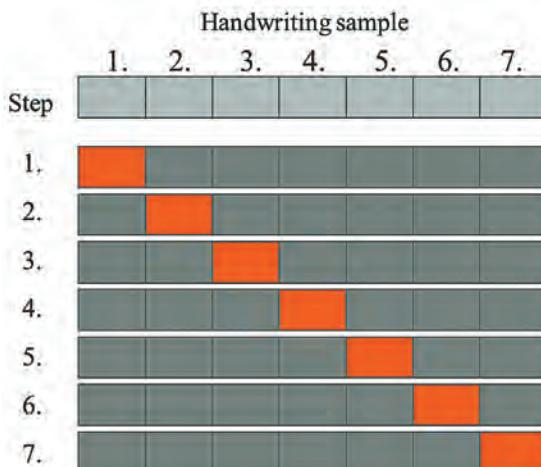


Fig. 30. Illustration of cross-validation.

The other two steps in this stage are calculating similarities and making the decision. We will illustrate these two steps together, without going into the detail of the mathematical approach used.

In the Cartesian coordinate system it is not difficult to imagine the distance between two points (see Figure 31a). The “nearest neighbour search” (NNS) method involves calculating the shortest Euclidean distance between the samples analysed. Usually, finding one “neighbour” is enough to identify the correct label, but this is not always the case. Sometimes we need to take more than one into account in order to obtain a more reliable result. Figure 31b gives an example, where the grey arrows with dotted lines are also taken into consideration. Of course it is possible that the shortest distance is greater than the limit value or “threshold”. In this case, where the computer finds a sample with too little similarity it refrains from giving a label to the nearest neighbour or declares that the sample is unknown and that there are no more handwriting samples from the same writer in the dictionary.

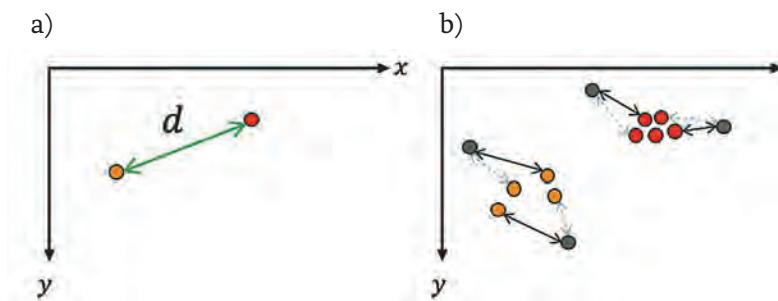


Fig. 31. a) Distance  $d$  between two points; b) Illustration of the shortest distances between samples.

Two databases were used to verify the effectiveness of our system. The first was created from five codices dating from the twelfth to the fifteenth centuries, available digitally from the website of the National Digital Library in Warsaw.<sup>22</sup>

- MS 12511 II - created [ca. 1175-1200]
- MS 3307 II - created [ca. 1160]
- MS BOZ 36 - created [ca. 1245-1255]

22 MS 12511 II, MS 3307 II, MS BOZ 36, 1197 V MS.

- MS 1197 V - created [1415]
- MS 3469 II - created [ca. 1401-ca. 1500]

In the base in question there are statistically 15 manuscripts in a code, and most of them have two columns, which gives 98 columns of text. Yet, it should be borne in mind that these columns were narrow. The division of all documents into lines of writing yielded 3510 images that were the input data to extract the handwriting and to examine the database of mediaeval texts. In the database of Latin manuscripts, for the classifier of the nearest neighbour the threshold of rejection of authorship is 0.25. The efficacy of the classifier for data prepared in this way was 99.66%.<sup>23</sup> The classifier made only one mistake when it misattributed one of the documents. The effect of such misattribution can be seen in Fig 32.

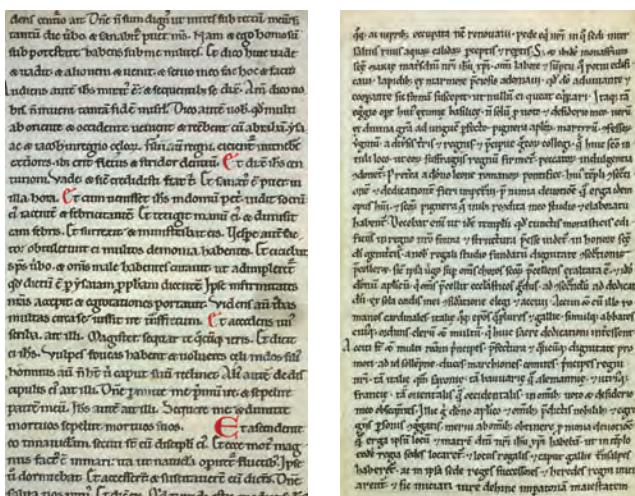


Fig. 32. Two different samples of handwriting attributed by the system to one person

The second was the database of contemporary manuscripts in English of the Computer Science Institute at the Modified database of the Institute of Informatics and Applied Mathematics (MIAM) at the University of Bern. It contains contemporary texts in English

<sup>23</sup> J. L. Pach, *Identyfikacja autora rękopisu łacińskiego..., op. cit.*

handwritten by 31 persons, nine or ten pages each, that is 2520 lines of handwriting. For this base the efficacy of the classifier equalled 98.8%. As before, the results of misattribution can be seen in Fig. 33.

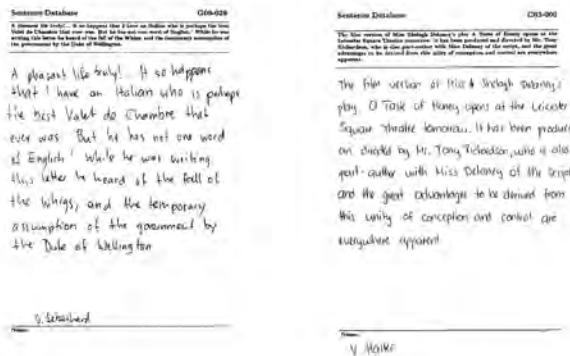


Fig. 33. Text written by two different persons misattributed to one person by the classifier. The manuscript on the left was wrongly attributed to the writer on the right.

In order to show the capabilities of the system these results were compared with those from other systems using the same MIAM database. To analyse the MIAM database a classifier of  $k$  nearest neighbours with the Soft TOP-N decision strategy. This strategy consists in indicating  $N$  documents from the dictionary that are closest to the analysed sheet. This decision is seen as correct if at least one of the documents of  $N$  closest ones was created by the author of the sheet in question. This strategy differs from the nearest neighbour method because it does not reject the authorship hypothesis when the similarity is too small, and it only indicates the most similar manuscript. For Soft Top-1 the results will be identical with the weighted nearest neighbour classifier. Tab. 1 shows the results of the MIAM database classification using a number of algorithms used by other researchers. As can be seen, the approach proposed proved to be the most accurate of all approaches investigated so far. Therefore it can be used to analyse contemporary handwriting.

**TAB. 1 RESULTS OF CLASSIFICATION BASED ON MIAM.**

Approach	Soft-Top-1
SOH <sup>24</sup>	78.4
Grapheme emission(GE) <sup>25</sup>	80
Countour-hidge(GH) <sup>26</sup>	81
GH+GE <sup>27</sup>	88
GMF[123] <sup>28</sup>	90
Siddiqi[124] <sup>29</sup>	91
Line fragment <sup>30</sup>	93.7
Countour-hidge(GH) <sup>31</sup>	94
SDS <sup>32</sup>	94.2
LPO <sup>33</sup>	96.7
Quill_Hindge <sup>34</sup>	97
SDS+SOH <sup>35</sup>	98.5
Presented in the article <sup>36</sup>	98.8

- 24 X. Wu, Y. Tang, W. Bu, "Offline text-independent writer identification based on scale invariant feature transform", *IEEE Transactions on Information Forensics and Security*, 2014, 9/3, p. 526-536.
- 25 M. Bulacu, L. Schomaker, "Text-independent writer identification and verification using textural and allographic features", *IEEE Transactions on Pattern Analysis and Machine Intelligence*, 2007, 29/4, p. 701-717.
- 26 Ibidem.
- 27 Ibidem.
- 28 X. Li, X. Ding, "Writer identification of chinese handwriting using grid micro-structure feature", *Advances in Biometrics*, 2009, p. 1230-1239.
- 29 I. Siddiqi, N. Vincent, "Text independent writer recognition using redundant writing patterns with contour-based orientation and curvature features", *Pattern Recognition*, 2010, 43/11, p. 3853-3865.
- 30 G. Ghiasi, R. Safabakhsh, "Offline text-independent writer identification using codebook and efficient code extraction methods", *Image and Vision Computing*, 2013, 31/5, p. 379-391.
- 31 A.A. Brink, J. Smit, M.L. Bulacu, L.R.B. Schomaker, "Writer identification using directional ink-trace width measurements", *Pattern Recognition*, 2012, 45/1, p. 162-171.
- 32 X. Wu, Y. Tang, W. Bu, "Offline text-independent writer identification based on scale invariant feature transform", op. cit.
- 33 D. Bertolini, L.S. Oliveira, E. Justino, R. Sabourin, "Texture-based descriptors for writer identification and verification", *Expert Systems with Applications*, 2013, 40/6, p. 2069-2080.
- 34 A. A. Brink, J. Smit, M. L. Bulacu, L. R. B. Schomaker, "Writer identification using directional ink-trace width measurements", op. cit.
- 35 X. Wu, Y. Tang, W. Bu, "Offline text-independent writer identification based on scale invariant feature transform," op. cit.
- 36 J.L. Pach, *Identyfikacja autora rękopisu łacińskiego*, op. cit.

The influence of the size of the learning dataset on the efficacy of the writer identification was also examined for Latin manuscripts. For such a base of old texts the system remains stable provided the dataset size is limited to 10 per cent – otherwise the efficacy is reduced to 97 per cent, and then drops down drastically. The size of the learning dataset is the percentage of all lines of writing of a given writer.

*Translated by Nick Ukhia*

## SUMMARY

This article presents the architecture of a system for automatically identifying samples of handwriting. The system allows for the fact that acquiring images is particularly difficult from Latin manuscripts due to the specific nature of such texts, and successfully extracts only such information as is necessary to analyse the features of the handwriting in the sample. The system proposed here is not only able to recognise correctly samples of a single author's handwriting in different scales, but also, after appropriate modification, to identify the features of the handwriting in which the text was written. This can also help with an initial assessment of the date when the text in question was created.

**KEYWORDS:** handwriting identification, Hough transform, scale invariant feature transform, pattern recognition, projection profiles



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# RZEWUSKI'S TRAVELS WITH GOLIUS

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There is no doubt that the travel journals from the Middle East left by Waclaw Seweryn Rzewuski (d. 1831) and the treatise on oriental horses, collected and published under the title *Sur les chevaux orientaux et provenant des races orientales*, constitute an invaluable research source for studies such as biography, historiography, ethnography or linguistics. Although the work has been made available to a wide readership,<sup>1</sup> it can be expected that, due to the abundance of material collected in it, it will be decades before it is comprehensively studied. This article analyses one of the linguistic aspects of the work, highlighting the complexity of the related issues and research perspectives, as well as the benefits of gaining a broader understanding of the journals' author and the creative process behind them.

The work contains a large number of oriental words, mainly of Arabic origin, most of which were written with the Latin alphabet. However, several thousand are quoted in the original Arabic spelling - these words are the subject of this study. Even a curso-

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1 W. S. Rzewuski, *Sur les chevaux orientaux et provenants des races orientales*, vol. 1, f. 61r - <http://polona.pl/item/476498>; vol. 2: <http://polona.pl/item/472484> [accessed 28.04.2020]. Translation of the quotations are based on the English edition: W. S. Rzewuski, *Concerning the Horses of the Orient and Those Originating from Oriental Breeds*, Warszawa 2017.

ry analysis of them reveals a very heterogeneous language. Some words undoubtedly originate from the purest Arabic language, in which each vocal sign was placed with pious care, without the nonchalant carelessness typical of Rzewuski. Some words cause difficulties, as nobody knows or remembers the meanings used by the author, and there are still other words that raise doubts, with spellings that are erroneous or distorted to such an extent that it would be impossible to guess their meaning if had the author neglected to describe them in French. A more detailed analysis makes it possible to distinguish something like linguistic layers, internally coherent in terms of form and factual matter.

A meticulous study of the Arabic lexis collected in *Sur les chevaux orientaux* reveals the close relationship between its most extensive and expressive layer and the material collected in *Lexicon arabico-latinum* by the eminent Dutch orientalist Jacob van Gool (d. 1667), known as Jacobus Golius. We know that Rzewuski had the lexicon in his book collection and that he frequently used it, but the scale of its impact has not been appreciated thus far. This fact is important due to the specificity of the dictionary, which, for Rzewuski, became one of the most important sources of knowledge about the Bedouin language and customs. The dictionary is a compilation and translation of medieval Arabic lexicons. The compilation was based on two general dictionaries: *Tāj al-Lughā wa-Ṣīḥāḥ al-‘Arabiyya* by al-Jawharī (d. 1003) and *Al-Qāmūs al-Muhiṭ* by al-Fayrūzābādī (d. 1414). The author enriched his lexicon with entries from several more specialised encyclopaedic dictionaries by al-Rāzī (d. 925), al-Maydānī (d. 1124), al-Zamakhsharī (d. 1143), Ḥamawī (d. 1225), Ibn al-Bayṭār (d. 1248) and al-Damīrī (d. 1405). He also based the entries on two late medieval foreign-language dictionaries: the Arabic-Persian *Kanz al-Lughā* and the Arabic-Turkish *Mirqāt al-Lughā*.

It should be added that in the Arab-Muslim culture, philological studies were originally subordinated to theology, which means that the main purpose of developing multi-volume lexicons was to improve the study of the language of the Quran and the understanding of other sources of Muslim law. For this reason, these

lexicons contain vocabulary obtained from a very limited group of texts - mainly pre-Muslim poetry, which may have its roots in the beginning of our era,<sup>2</sup> as well as various works from the first three centuries of the Hijra, that is, no later than the 9<sup>th</sup> century. The vocabulary quoted by Arabic lexicographers is often no longer used, and there are doubts as to its correct meaning. Hence the context is often cited in the form of a fragment of poetry or a quotation from which the lexicographer took a specific word.<sup>3</sup> Later authors did not have much to add, so they quoted the definitions of their predecessors and compiled earlier works, discarding entries they deemed redundant and adding new ones if they gained access to new sources.

Another element that cannot be ignored when discussing the subject of Arabic lexicography is language. The Arabic literary language has not changed substantially since it was codified in the 8<sup>th</sup> century. Any well-educated Arab has a good command of it. However, it should be remembered that it is not a natural language, and no one has ever spoken it as their mother tongue. It was created by Arabic grammarians, probably on the basis of the Quranic language, but enriched with a large body of vocabulary from various dialects of the then Arabian Peninsula, and then archived. The differences between the literary language and spoken Arabic, which itself can be divided into countless dialects, are so great that it is considered as *diglossia*. Thus, what Rzewuski writes is not true:

The code of law is simple. It is the Quran. Few know how to read it, all understand it, because the Bedouins speak *nahwī* Arabic which

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- 2 The oldest non-anonymous Arab poet, whose work dates back to the 5<sup>th</sup> century and has been preserved until now, was ‘Adī ibn Rabī‘a (d. 531), also known as al-Muhalhal. It is him that mediaeval compilers of poetry indicated most often as the creator of *qasida*, the Old-Arabic lyric narrative poem. See: Muhammad ibn Sallām al-Jumahī, *Tabaqāt al-Shū‘arā’*, Bayrūt 2001, p. 38. However, it is possible that part of the preserved literary output of this period may in fact be far younger. The first scholar to question the authenticity of pre-Muslim poetry and claim that a part or even its entirety may have been written only in the first centuries of Islam was Tāhā Ḥusayn (d. 1973). See: idem, *Fī al-Adab al-Ǧāhili*, Al-Qāhirah 2011.
  - 3 M. R. Zammit, *A Comparative Lexical Study of Qur’ānic Arabic*, Leiden, Boston, Köln 2002, pp. 17–18.

is the pure and grammatical language in which the sacred book is written.<sup>4</sup>

It is not an isolated opinion. It comes from a deeply rooted stereotype that of all Arabs, only Bedouins maintain a pure and correct language (to this day, a common belief is that dialectal differentiation is the result of a departure from literary Arabic, and therefore a kind of linguistic corruption).<sup>5</sup> Indeed, Arabic sources say that the linguistic disputes raised by grammarians from the opposite schools in Kufa and Basra in the first two centuries of the Hijra were often settled by Bedouins. We can also find traces of their old dialects in today's literary language. However, it is not true that their dialects should be similar or identical to the language of the Quran, nor that they speak the language of literature. Rzewuski seems to ignore the fact that spoken Arabic, whether spoken by an illiterate Bedouin or an educated city-dweller, is something completely different in terms of phonetics, grammar, and lexis. Therefore, the ease with which he accepts words - archaic words, derived from medieval Arabic - from Golius is not surprising. The spelling itself and the phonetics behind it reveal that they are an element of the literary language and do not belong to any dialects of the spoken language. He has no qualms about placing them in the mouths of the Bedouins and telling us that this is the testimony of their language.

Rzewuski is very keen on using Golius. Explanations of the quoted words are often a more or less faithful translation of the dictionary entry into French, and sometimes Rzewuski does not even bother to translate them and quotes in original (Latin). In the first case, we are dealing with an indirect translation from Arabic without consulting the original, so it is natural that the meaning of some words is not quite clear, becomes blurry, and sometimes loses its original meaning completely. Numerous examples of this are provided by Rzewuski's lists of horse and wind names, which

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4 *Sur les chevaux...* vol. 1, f. 61r.

5 *A Comparative...* pp. 38–39.

consist almost entirely of words taken from Golius. For example, a *wahwah* is, according to the list mentioned above, a “fiery and agile horse”, while Golius, like al-Fayrūzābādī (to whom the Dutch scholar refers), maintains that it is “a fit and skilful horse”.<sup>6</sup> The discrepancy in the definition given by Rzewuski is undoubtedly the result of the phenomenon mentioned above. Al-Fayrūzābādī, when describing the horse, uses the word *hadid*, the basic meaning of which in Arabic is sharp. However, when used in relation to people, as the lexicographer himself notes, *hadid* means someone who is bright, learned.<sup>7</sup> Golius very cleverly finds the equivalent of this word in the Latin *acer*, which means both a clever person and a sharp object, but – unlike the Arabic equivalent – it also refers to taste, meaning acrid or burning. This is probably why Rzewuski translates the word in French as *ardent*, which means burning.

Sometimes the shift in meaning is due to the inaccuracy of the Arabic source or the awkwardness of the Latin description. We deal with the latter in the description of a horse allegedly named by the Arabs *ħurāq*, about which Rzewuski writes: “a horse that pushes itself vigorously”.<sup>8</sup> According to Golius, it is an “invigorated after galloping and frisky horse”.<sup>9</sup> In reality, however, *ħurāq* is not the name of a horse, but only a component of a phraseology related to a horse. Al-Fayrūzābādī, referred to by Golius in his definition, writes as follows: “The horse is *ħurāq al-’adw* [lit. of a burning gait], if it was invigorated during the gait”.<sup>10</sup> Golius makes a mistake, which Rzewuski then repeats. It should be noted that *ħurāq al-’adw* is a kind of epithet. The words are used to praise a horse, but it is not its name. The same goes for almost all entries in that index, as well

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6 *Sur les chevaux...* vol. 2, f. 54v.

Jacobus Golius, *Lexicon arabico-latinum contextum ex probatioribus orientis lexicographis accedit index latinus copiosissimus qui lexici latino-arabici vicem explore possit*, Amstelodamum M DC LIII [1653], col. 1742. Majd al-Dīn ibn Ya’qūb al-Fayrūzābādī, *Al-Qāmūs al-Muhiṭ*, Bayrūt 2005, p. 1256.

7 *Al-Qāmūs...* p. 276.

8 *Sur les chevaux...* vol. 2, f. 54v.

9 *Lexicon...* col. 599.

10 *Al-Qāmūs...* p. 873.

as for many other Arabic terms appearing in the work. This is due to the specificity of Arabic lexicons, which document the meanings of words in relation to the context in which they are used, so they are not fully abstracted, as is the case in modern dictionaries. The horse can be said to be *hurāq al-'adw*, probably because one of the poets described a horse in such a way in one of his poems.

However, an in-depth translation analysis is not required to document what a valuable source of knowledge about the Arabic language and culture Golius' lexicon was for Rzewuski and estimate the scale to which it influenced the work itself. It is enough to take the following fragment noted in the margin, referring to one of the two plants that Rzewuski remembered from his travels in the Middle East:

It is beneficial for the camels, while another that resembles it and which the Arabs call '*unżuwān*' is unhealthy and causes pain to their entrails. This herb is of the species named *ḥamḍ* which is bitter and salty, and which Golius called *Oxygala crassa*. I believe, though I cannot be sure as my memory may be playing me false, that in the desert it is called '*amāqa*' or '*imqà*'. It grows to resemble a kind of wig, and no stem is ever closer to another than the distance of a foot or more. It covers vast areas and its territories multiply in the desert. It is also called *shīḥ* (*Absinthium ponticum*). The Arabs use it as a simple against worms.<sup>11</sup>

In the passage quoted above, Rzewuski gives four names: '*unżuwān*', *ḥamḍ*, '*amāqa*' or '*imqà*', and *shīḥ*. He believes that they all refer to a plant he observed in the desert: a plant that "grows to resemble a kind of wig, and no stem is ever closer to another than the distance of a foot or more". However, one can be sure that these names were not heard from Bedouins, and this is evidenced not only by their spelling, which, given by Rzewuski in the Arabic transcription, corresponds to the orthography of the classical language but also by several other factors.

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11 Ibidem, f. 10r.

One can start by looking at the plant which he describes: “I believe, though I cannot be sure as my memory may be playing me false, that in the desert it is called ‘*amāqa* or ‘*imqā*’, where the word عَنْقَى ‘*imqā*’, which is correct in Arabic, is transcribed as ‘*amaqī*, which is an incorrect interpretation of its rather complicated spelling.<sup>12</sup> It is impossible that Rzewuski, upon hearing this word spoken by a Bedouin, could write it correctly, taking into account its historical spelling, and he was also unable to pronounce it correctly. Both variants of the word, ‘*amāqa* and ‘*imqā*, undoubtedly come from Golius’s dictionary, but they were written next to each other as a result of a typesetter’s mistake because they mean something completely different. Immediately after the word ‘*amāqa* and before the word ‘*imqā*, there is an abbreviation: *Act. τζ Conj. I.*, which we expand as *actionis nomen coniugationis primae*, i.e., a noun expressing an action defined by a verb in the first conjugation.<sup>13</sup> This is what ‘*amāqa* in Arabic means – “being deep” – because the verb to which Golius refers is *profundus fuit*, meaning “it has become deep”. Rzewuski apparently ignored the abbreviation and concluded that the word ‘*amāqa* was synonymous with the word ‘*imqā*, which was not listed graphically as a separate entry. There are also doubts as to the legitimacy of assigning the word ‘*imqā* to the plant described by Rzewuski because before it ceased to be used, it was probably a tree species. Although Golius writes that it may be “the name of

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<sup>12</sup> Today we will rather write عَنْقَى . A characteristic feature of the orthography used by Golius is the lack of a contemporary *alif maqsūra*, regularly replaced by an unvocalised letter *yā'* preceded by a vocalisation sign - *fatha*. This type of transcription is consistent and should not raise any doubts as to its interpretation. It should be remembered that while today, in the era of printing, the orthography of the Arabic language is heavily codified, in Rzewuski’s time, when printing houses with Arabic fonts operated mostly in Europe and the handwritten book still reigned in the Middle East, writers had greater freedom in this matter. Various methods of writing letters and transcription of diacritical marks could cause some problems for the uneducated reader in their correct interpretation, as evidenced here by Rzewuski.

<sup>13</sup> The Greek letters *τζ* (abbreviation from *τῆς*) function as an article describing the feminine gender in the genitive and are designed to restore the syntactic relations between the individual members of the abbreviation lost as a result of truncating inflection endings. In this particular case, they refer to the word *coniugatio* and make it read in the genitive form as *coniugationis*.

a plant or tree in Arabia that pleases camels”, the source he refers to, namely al-Jawharī, says: “*Imqà*, vocalised by *i*, is a tree in Hejaz and Tihamah, and ‘āmiq is the camel that feeds on it”.<sup>14</sup>

Everything indicates that each of the names in their original texts referred to a different plant or group of plants, and Rzewuski freely combined them all to describe the plant he remembered. Thus, *shīḥ*, or wormwood - a name that is still common in Arabic today - is described by Golius as follows: “*Absinthium ponticum*, whose seed kills vermin”.<sup>15</sup> This information is also quoted by Rzewuski: “It is also called *shīḥ* (*Absinthium ponticum*). The Arabs use it as a simple against worms”.<sup>16</sup> Another name for this plant is ‘*unżuwān*, with the information that it causes bowel pain in camels. This remark was also taken from Golius, who writes that ‘*unżuwān* is “a species of plant of the genus *hamd* which, if eaten in large quantities, causes bowel pain in the camel”, which is a fairly accurate translation from al-Jawharī: “*Unżuwān* is a kind of a plant; if a camel ate it in abundance, its stomach will ache”.<sup>17</sup> Particularly noteworthy is the fact that this word was not in common use in the times of al-Jawharī, as shown by the fragment of Rājiz’s poetry (d. 762) placed after the definition – evidence that the word was in use in the meaning described. Golius’s remark that ‘*unżuwān* is a variation of *hamd* comes from Fayrūzābādī’s lexicon, who writes: “*Unżuwān* [...] is a plant of the [genus] *hamd*; if a camel ate it in abundance, it will ache its stomach”.<sup>18</sup> Golius writes that *hamd* is “a salty and bitter plant as well as concentrated whey”, while al-Jawharī notes that it is: “any plant that is salty and bitter, such as *rimth*, *ṭarfā’* and *athl*”, i.e., varieties of tamarisk and clove.<sup>19</sup> Fayrūzābādī, to whom Golius does

<sup>14</sup> Ismā‘il ibn Ḥammād al-Jawharī, *Al-Ṣīḥāh. Tāj al-Lughah wa-Ṣīḥāh al-‘Arabiyya*, Bayrūt 1990, vol. 4, p. 1533.

<sup>15</sup> Lexicon... col. 1328.

<sup>16</sup> Sur les chevaux... vol. 1, f. 10r.

<sup>17</sup> Lexicon... col. 1656, *Al-Ṣīḥāh...* vol. 3, p. 1174.

<sup>18</sup> *Al-Qāmūs...* p. 697.

<sup>19</sup> Lexicon... col. 653. I translate *oxygala crassa* as concentrated whey by analogy with the ancient Greek ὀξύγαλα or whey (*crassa* in Latin means dense). However, it cannot be ruled out that Golius meant some other dairy product with a tart

not refer to in this case, writes: “*hamd* is any plant that is salty and bitter, and it is like fruit for a camel, while *khulla* is one that is sweet and is like bread to him”.<sup>20</sup> It is clear from this that the word *hamd* is not used to denote a specific plant, but anything bitter, which makes it particularly attractive to camels. The 8<sup>th</sup>-century poet immortalised one such plant in his poem, calling it ‘*unżuwān* and saying it caused excessive abdominal pain when eaten in excess.

This example reveals a method which, as is clearly indicated, Rzewuski used when writing his journal. It seems that while living among the Bedouins, he actually observed many of their customs and the world in which they lived. However, it seems he forgot to ask them, “how do you say this in Arabic?”. When the time finally came to write down his observations, he could no longer ask this question, so he resorted to Golius – the undisputed authority in the field of the Arabic language. He must have been sincerely convinced that all these colourful descriptions, which must have evoked vivid memories from the trip, actually referred to what he once had a chance to observe. As it turns out, however, his associations often misled him. This is best documented in the following fragment about the water reservoirs used in the desert:

All of the desert wells are either natural cisterns, immense porosities contained in a bed of solid rock, of which the upper crust, ordinarily one to two feet in thickness, has been pierced by a hole a foot and a half in diameter, or wells where the water slowly renews itself on its own. These are very rare. The former, the cisterns, are filled by rainwater. But all of these wells, after their water ceases to be stirred up by continual use, become covered by a layer of small green grasses, stinking and filled with a great number of small insects called *barṣ*, which means leprosy. [...] The word *barṣ* means leprosy. It is possible and even probable that, in earliest times, using this water, permeated with this grass and spoiled by this mass of insects, was one of the causes of leprosy.<sup>21</sup>

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taste. The word *hamd* in modern Arabic means acid. Rzewuski apparently did not understand it and took it as the systematic name of the plant Golius wrote about earlier.

*Al-Sīḥāḥ...* vol. 3, p. 1072.

20 *Al-Qāmūs...* p. 640.

21 *Sur les chevaux...* vol. 1, f. 86v–87r.

To observe the phenomenon discussed, one should focus on the word *barṣ*, which, according to Rzewuski, is a term for insects with certain habits unpleasant for people. It can be said that Golius gives his imagination free rein by writing that the word defines "a small animal that breeds in a well".<sup>22</sup> This is an exact translation from Fayrūzābādī: "*Barṣ* is a small animal that breeds in a well".<sup>23</sup> This animal is undoubtedly a frog and not the vermin observed by Rzewuski and associated with leprosy. Although in today's literary version of Arabic, the word means lizard and has a slightly changed vocalisation, pronounced *burs*, it should be remembered that distinguishing amphibians as a separate class is an achievement of the late modern era.<sup>24</sup> We can hear an echo of this lack of distinction in the word *wazagh*, meaning a frog in Persian, or gecko in Arabic. This is the same word that Golius, quoted by Rzewuski, uses after Ibn al-Bayṭār as a name for a lizard called *sāmm abraṣ*, which is said to cause leprosy by biting.<sup>25</sup> The etymological connection between the words *baraṣ* and *barṣ* (*burs*) undoubtedly exists, but it is of a different nature than what Rzewuski assumed. The reason for the association was probably skin changes resulting from leprosy and lizard-like scales or warts, with which the skin of amphibians is sometimes covered.

The above examples were to prove that one of Rzewuski's most important sources - or perhaps even the most important one - was the Golius's lexicon. This is where he obtained information about the spelling and meaning of specific Arabic words. Thus, he must have learnt a great deal about the life of Arabs in the desert. In view of all this, the question arises whether Rzewuski made notes while in the Middle East, which he could use to write his work. As

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22 *Lexicon...* col. 256.

23 *Al-Qāmūs...* p. 613.

24 Edward William Lane also draws attention to the words *barṣ* and *burs* in: *Arabic-English Lexicon*, Beirut 1968, vol. 1, p. 188. He proposes a hypothesis that according to al-Fayrūzābādī, *barṣ* is a more correct form than the allegedly colloquial *burs*.

25 *Sur les chevaux...* vol. 1, f. 87v, *Lexicon...* col. 2209.

it was mentioned at the very beginning, the material he quotes in Arabic is heterogeneous and clearly multi-layered. It is possible that one of these layers may correspond to material from his travel journal. It refers to the most distorted script. It is not so extensive, and although it contains a considerable amount of lexis, it is limited mainly to geographical names – they document the next stages of Rzewuski's journeys. Some of the words for horse breeds should also be included in this group, although most of them certainly come from the treatise *Kitāb kāmil al-ṣinā'atayn al-bayṭara wa-l-zardaqa* by Abū Bakr ibn Badr al-Dīn al-Bayṭār (d. 1340). It may also include a few other, much smaller parts of the manuscript, such as, for example, the methods of fortune-telling written on the margins. As for the distorted record, it can be presumed that it did not result from the author's incompetence or a hearing impairment, as it might initially appear. There are indications that the alleged travel journal was written only with the Latin alphabet. The distortions appeared only when Rzewuski wanted to restore the original Arabic spelling to the transcribed words, although he had probably never seen it before.

Strong evidence that Rzewuski relied on notes written with the Latin alphabet can be found in the translation of one of the three Arabian horse certificates quoted in Arabic graphics. There, we find the name of the month of the lunar calendar that does not appear in the Arabic text, *jumādā al-ākhir(a)*, which in the manuscript looks like this: *djoumas el aschir*.<sup>26</sup> The form of the last part of the name, whose only possible phonetic realisation is *āshir*, can be explained only if we assume that it was rewritten, misinterpreted, and corrected from the *achire*, which must have been in Rzewuski's original notes, and is the exact record of the Arabic pronunciation. Having forgotten what the word originally sounded like, he had to read it in accordance with the French pronunciation and correct it so that there was no doubt whether “ch” should be pronounced in the same way in Polish and German or French (this problem was

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26 *Sur les chevaux...* vol. 2, f. 57v.

not ultimately addressed by the author and this duality in the pronunciation of “ch” applies to almost the entire manuscript).

We also know that Rzewuski tried to write in Arabic words that he knew only in Latin script. An example of this can be found in the following passage:

Everyone knows the story of the great reservoir of the Sabaean people, called by the Arabs *Si'at Ma'rib*, The Misfortune of Ma'rib. [...] The name *si'a* signifies *malum, infortunium, peccatum*. Ma'rib was the name of a Sabaean king who had founded that dike. The surname of the founder, moreover, is surely derived from that fine and industrious enterprise, because the word *ariba*, the root of *ma'rib*, signifies industrious, learned, experienced.<sup>27</sup>

The explanation of the meaning of the words, which, as Rzewuski argued, make up the name of the described reservoir, comes of course from Golius's lexicon.<sup>28</sup> However, it turns out to be more important to identify the second source of the cited argument. This is undoubtedly the *Description de l'Arabie* by Carsten Niebuhr (d. 1815), as evidenced by, among other things, the very characteristic spelling of the name *Si'at Ma'rib*, which in Niebuhr is called *Sitte Mareb*, and in Rzewuski's manuscript *Sitté Mareb*.<sup>29</sup> The word *sitte* certainly stands for the Arabic *sidd*, which is the dialectal pronunciation of the classical *sadd*, meaning a dam. *Sadd Ma'rib* is Arabic for “a dam of Mariba”, not the name of a reservoir, as Niebuhr mistakenly argued and Rzewuski followed. Rzewuski, looking for the meaning of the word *sitte*, must have found the word سَيَّةٌ *si'a(t)* in Golius's dictionary,<sup>30</sup> the pronunciation of which he misinterpreted as *sit* (which corresponds to the French reading of the word used by both travellers in Latin script). Convinced that he had found what he was looking for, he wrote it down in Arabic and explained it as described above.

<sup>27</sup> Ibidem, vol. 1, f. 66r–66v.

<sup>28</sup> Lexicon... col. 62, 64, 1232.

<sup>29</sup> M. Niebuhr, *Description de l'Arabie*, Paris M DCC LXXIX [1779], vol 2, p. 120.

<sup>30</sup> In modern literary Arabic, this word is سَيِّةٌ *sayyi'a(t)*.

All these examples, and others that have not been discussed here, speak volumes about the creative process that led to the creation of *Sur les chevaux orientaux*. Personal experiences were only one and perhaps not the most important source of knowledge that the author used in developing the materials. Although Rzewuski himself sometimes refers to other authors, including Golius and Niebuhr, he often omits references, which poses a risk that one might assign all the findings to Rzewuski. Before he is criticised, however, one should consider whether the perspective of his work is correct. It turns out that if one puts his workshop and working methods under the microscope, it seems more appropriate to perceive him not as a researcher but as a writer. Rzewuski did not carefully document the world as he observed it but used all available sources (including gained experience and personal observations) to create fiction, which was meant to be internally consistent, credible enough for the reader to believe, but also written in a wonderful way so as to seduce the reader. Rzewuski appears in it as a Bedouin prince, rushing through the desert on his favourite mare, Muftakhara. Maybe the words he used to describe a Bedouin refer to himself?

Driven by a taste for the marvellous, he yields easily to credulity. His belief is simple, his faith without boundaries, his curiosity great [...]. Offspring of his imagination rather than results of his calculation, his conjectures wander without direction towards the future, which absorbs all his thoughts.<sup>31</sup>

Nothing can hold back his thoughts, nothing can obstruct his view. The vast expanse strokes his flights of fancy. The richest of languages, most fertile in images, further intoxicates him with the charm of its diction. He speaks in pictures. He is listened to with enthusiasm. He set down the offspring of his reveries in his immense desert. He creates more than he invents. With him fiction owes more to the seduction of the marvellous than to neglect of the truth.<sup>32</sup>

*Translated by Alicja Rosé*

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31 *Sur les chevaux...* vol. 1, f. 18r.

32 *Ibidem*, vol. 1., f. 17v.

## SUMMARY

There is no doubt that Wacław Seweryn Rzewuski was one of the most colourful personages of Polish Romantic era. In spite of numerous accounts of his life and work, still little is known about his travels and adventures. His own reports thereof are particularly conventionalized and purposefully mythologized, and cannot be trusted unconditionally if one wants to establish the truth. Therefore, the present article aims at deconstructing the legend enshrouding Rzewuski. Its author analyzes some of the linguistic aspects of Rzewuski's *Sur les chevaux orientaux et provenant des races orientales*, which is both a record of his travels in the Middle East and a treatise on oriental horses. Special attention is given to how Rzewuski was influenced by Jacobus Golius, the author of one of the most popular Arabic-Latin dictionaries, not only as far as linguistic questions are concerned, but also regarding the life and culture of contemporary Arabs. This analysis makes it possible to hypothesize about the circumstances of the creation of the treatise and about the creative process itself, in order to revise our understanding of his work.

KEYWORDS: Wacław Seweryn Rzewuski, *Sur les chevaux orientaux*, Concerning the Horses of the Orient, Jacobus Golius, Lexicon arabico-latinum

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# ARCHIVES OF THE PRUSSIAN STATE LIBRARY IN BERLIN IN THE COLLECTIONS OF THE JELENIA GÓRA DEPARTMENT OF THE STATE ARCHIVES IN WROCŁAW

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In the Jelenia Góra department of the State Archives in Wrocław is stored a small part – consisting of 60 archival units – of the current records (*Registratur*) of the Prussian State Library in Berlin (*Preußische Staatsbibliothek*) from the years 1939–45. It is a remnant of the office of the Berlin library's catalogue and acquisition departments, which operated in the foothills of the Karkonosze mountains in the last months of the Second World War. It consists of rather accidental drafts and correspondence, which German librarians, who left the Jelenia Góra facility in spring 1945, did not evacuate to the West. It is in no way representative of the off-site centre in Jelenia Góra – it documents the work of librarians transferred there only to an extent. Instead, it gives an idea of the problem of completing the library collection during the war, which is valuable information about German cultural policy at that time. The purpose of the following remarks is – first of all – to present the content of the archival fonds “Prussian State Library Department in Jelenia Góra”

and to indicate its historical value; secondly, to discuss issues that complement our knowledge on the Berlin library's war activities in the field of acquisition; thirdly - perhaps most importantly - it gives us clues for further archival inquiries.

Work on securing collections began before the outbreak of the Second World War, due to fear of French and English air attacks at the Prussian State Library. In the last days of August 1939, selected European and Oriental manuscripts and the most valuable cartographic collections were transferred to specially protected shelters in the basement of the Ministry of Economy. Extensive operations were undertaken in the spring of 1941 when the first Allied bombs fell on the Berlin library building at Unter den Linden. From September to November 1941, a significant part of European and Oriental manuscripts, music collections, incunabula, and other materials classified as *rarissima* were taken from Berlin. In the following months, along with the increasing threat of Allied air attacks, it was decided to expand the scope of evacuation. In the summer of 1942, the most valuable old prints were taken from the library. They found shelter in Hessian, Saxon, and Silesian monasteries, churches, palaces, castles, and unused adits (mining passages). By mid-1943, around 800,000 volumes had left Berlin. The third phase of the evacuation began after the carpet bombing in Hamburg at the end of July 1943. The intensive work lasted almost until the end of the war, and the last transports left Berlin in March 1945. The collections were often transferred together with the entire departments they belonged to and the department's employees. In the spring of 1944, the general director, Hugo A. Krüß, who managed the library from Görlsdorf and Luckau, left Berlin. Off-site departments of the Berlin library were established in many centres, based on the principle of scattering valuable collections for protection. A significant part of the cartographic collections was in Neugersdorf at the foot of the Erzgebirge, and the employees of the music collection department went to Rühstädt in Brandenburg. The largest department in terms of the number of employees, was created in Jelenia Góra (then Hirschberg). From

April to July 1944, the employees of acquisition and catalogue departments were transferred together with their current records (including files from the interwar period, as well as those created after 1939), nearly two thousand volumes of subject catalogue and bibliographic aids. Mandatory copies of books and journals sent to the Berlin library were sent on to Jelenia Góra. Work under the direction of Rudolf Juchhoff and Eugen Paunel was carried out in the buildings of the local municipal archives and museum. In February 1945, the department was dissolved, and most of the books, files, many volumes of the subject catalogue and the accessions books and other materials located in Jelenia Góra were transported to Berlin and other temporary storage facilities by April 1945. According to Werner Schochow, a researcher of the history of Berlin's library, part of the materials was left in place "to avoid the impression that the department was completely dissolved".<sup>1</sup> These materials, left in Jelenia Góra - as Schochow supposes, intentionally - or not taken for other reasons, constitute, as indicated above, a rather random collection.<sup>2</sup> It consists of fragments of the current records (*Registratur*) of the catalogue and acquisition departments, drafts, correspondence with private institutions (mostly with antiquarians who "legalised" the stolen items), as well as military and police authorities of the Third Reich, mainly from 1939–1944. The files left behind by the Berlin librarians, despite the Schochow

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- 1 Werner Schochow, *Bücherschicksale. Die Verlagerungsgeschichte der Preußischen Staatsbibliothek: Auslagerung, Zerstörung, Entfremdung, Rückführung. Dargestellt aus den Quellen*, Berlin–New York 2003, p. 149. The author does not provide the source dossier for his suppositions.
  - 2 Kurt Tautz, *Die Preußische Staatsbibliothek in Hirschberg im Riesengebirge zur Zeit des zweiten großen Krieges 1944–1945. Blätter der Erinnerung*, Opladen 1950. It is worth adding that most employees from Jelenia Góra were sent to Berlin between 10 and 27 February, although some left the city later. The last librarians left Jelenia Góra on 19 August 1945. In addition to materials from the archives, about 17,000 volumes remained, which were sent to Berlin in 1965. Schochow estimated the total number of books left in Jelenia Góra at around 22,500. A German historian pointed out that dictionaries and encyclopaedias were not returned to Germany, but were divided between various Polish scientific institutions. According to Schochow, at least one hundred volumes were included in the University of Warsaw Library resource: "Weitere mindestens 100 Bücher sind heute im Besitz der UB Warschau", Schochow, *Bücherschicksale...*, p. 150.

supposition, were probably transferred to the archives in the form of scattered, loose files without proper arrangement.

There is not much information about the collection in the guide to the Jelenia Góra archive.<sup>3</sup> In 2003, Werner Schochow published a book on the war history of the Berlin library, describing the Jelenia Góra archives. Contrary to the actual state, he noted that “they are in a very poor condition”, and “isolated from the main Berlin collection, on the spot they serve nobody”.<sup>4</sup> He rated the historical value of materials as relatively low. He deemed them to be files documenting the completion of collections (by way of purchase, exchange, or delivery in the form of a mandatory copy). He underestimated the files’ value regarding the collaboration of the Berlin library with military and police authorities (“this includes various materials documenting the proceeds of unwelcome political books confiscated by secret police or the army, objects robbed in Russia and other occupied areas in the East”).<sup>5</sup> His work reveals only a superficial knowledge of the materials described. In fact, these files provide interesting information on the functioning of the Berlin library in relation to supplementing the collection and the cooperation of the library with the police and military authorities of the Third Reich.

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- 3 Czesław Margas, *Archiwum Państwowe w Jeleniej Górze. Przewodnik po zasobie*, Jelenia Góra 1984. There is no mention of the archive in *Archiwalny biuletyn informacyjny. Wojewódzkie Archiwum Państwowe we Wrocławiu i jego oddział terenowy w Jeleniej Górze*, Warszawa 1955, or *Archiwum Państwowe we Wrocławiu. Przewodnik po zasobie archiwalnym*, Wrocław 1996.
- 4 “Sie [die zurückgelassenen Berliner Geschäftspapieren - J.K.] sind in sehr schlechtem Erhaltungszustand und nützen vor Ort [...], isoliert von den Hauptakten und in Unkenntnis der Berliner Aktenführung, niemandem”, p. 114. He stated with considerable reproach: “Es ist bislang nicht gelungen, selbst dieses, seines Zustandes wie seines Inhaltes wegen in Jelenia Góra kaum verwertbare Material zurück zu erhalten... Lediglich eine Benutzung vor Ort ist der deutschen Seite zugestanden worden”, ibidem, p. 150. He asked rather passionately: “Wie lange will man dort [in Polen - J.K.], wenn schon Bücher nicht zur Disposition stehen, selbst interne Geschäftsgangsaiken der PSB aus den 1930er/1940er Jahren, die in Hirschberg niemandem nützen, noch zurück behalten”, ibidem, p. 225.
- 5 “Historischen Wert besitzen zumal jene Akten, die die Zweige der Erwerbung (Kauf, Tausch, Pflicht, usw.) dokumentieren. Dazu gehören diverse, über die Gestapo oder die Wehrmacht laufende Vorgänge zur Beschlagnahme politisch mißliebiger Titel; ferner auch solche über Beutematerial aus Russland und anderen besetzten Ostgebieten”, Schochow, *Bücherschicksale...*, p. 150.

The collection's order and structure suggest that when labelling the collection, the archive employees were not familiar with the library's structure and the competences of individual offices, nor with the content of the documentation itself. The files are mixed up, and the names given to individual archival units are often misleading. In the archival unit marked with reference number 1, "Orders and loose prints regarding librarianship", there are works by Joris Vorstius, a librarian, author of books and articles in the field of bibliology and history of libraries, and one of the publishers of *Bibliographie des Bibliotheks- und Buchwesens* working in the Berlin library department in Jelenia Góra during the war. Under number 3, "Berichte (works on the library resource in the department in Jelenia Góra)", there are two draft journals concerning the work of the library in the second half of 1944. The first is a draft from mid-October 1944, circulating among and informing publishers about the provisions on sending a mandatory copy to the Prussian State Library. It was reported that the restrictions introduced by the post, consisting of delivering parcels only in the area of one hundred kilometres, did not apply to journals and newspapers, the collection of which was necessary "for the purposes of documentation and subsequent research".<sup>6</sup> The second, undated draft (probably from the second half of 1944) contains a project to create a city library in Jelenia Góra.<sup>7</sup> The folder also contains letters from the period after the end of the war: a letter from the management of the Jelenia Góra unit to the new German city authorities appointed on 8 May

6 "Die Weiterlieferung [...] ist für Zwecke der Dokumentation und künftiger Forschung unbedingt nötig", Draft letter from the management of the Jelenia Góra department of the Prussian State Library to publishers, Jelenia Góra, 14 October 1944, Archiwum Państwowe we Wrocławiu, Pruska Biblioteka Państwowa Oddział w Jeleniej Górze [Wrocław, Prussian State Library, Department in Jelenia Góra, III] 1 (all quotes from archival sources, unless otherwise stated, come from these fonds. The archive reference numbers are signed with Roman numerals, pages with Arabic numbers).

7 "Bei der Zerstörung öffentlicher und privater Bibliotheken und der Einschränkung der deutschen Bücherproduktion fällt den vom Luftterror verschonten Städten die Aufgabe zu, durch Ordnung und Mehrung ihrer Bibliotheken die entstehenden Lücken zu schließen und Bücher der Öffentlichkeit zur Verfügung zu stellen", second half of 1944, III, 2.

1945, asking for permission for the department to continue working until they established contact with the library management so that reports from ongoing inventory work could be submitted to the new Polish staff.<sup>8</sup> It is worth mentioning that this proves there was good cooperation between the Polish authorities and German librarians, who dealt with cataloguing collections, arranging them on shelves, and other library objects.<sup>9</sup> The unit marked with reference number 4, “Bibliothek (correspondence of the City Board in Jelenia Góra regarding library matters)”, contains materials of various provenance from the municipal city library in Jelenia Góra and the Prussian State Library. The first group includes files illustrating the process of ordering office supplies: for example, a letter of intent from Berlin publishing and printing company Otto Schwartz & Co. sent in November 1941 and directed to the head of the municipal city library in Jelenia Góra, presenting the offer of library forms (pp. 19–20), along with sample forms (pp. 22–27). Under the same reference number, we find a reference book regarding the activities of German civil authorities during the First World War. The list is not dated, and it is not known whether it included items that were in the municipal city library or whether they were transported from Berlin to Jelenia Góra. It seems likely that the census was prepared in Berlin and was supposed to be a kind of pattern for librarians developing the war collection created in September 1939.

The two main groups of files contain correspondence regarding the mandatory copy (5–14, 23, 24, 27, and part of 25 and 28) and files illustrating the process of obtaining by the Berlin library of manuscripts and prints during the war (15–22).

Along with the transfer of the acquisition department to Jelenia Góra, correspondence regarding mandatory copies was sent as well. Files preserved in Jelenia Góra can be divided into three groups. The first consists of official prints from 1936–1944. These

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8 III, 3–4.

9 Reports from 1, 16 June; 2, 12 July 1945, III, pp. 5–7, 10–20.

are bulletins, reports, periodic publications, including catalogues, occasional publications, other studies commissioned by state and local government institutions, the press of German military units and allied forces, newspapers published in prisoner-of-war camps. In the Jelenia Góra collection, these materials are mixed up - not all the files were kept in chronological order. 1941-42 marks an important turning point. In the pre-war period and the first years of the war, a mandatory copy of official prints was sent to the library on an ongoing basis, and the book employees usually did not have to send reminders. As the files stored in the Jelenia Góra archives show, sometimes the parcel was supplemented with additional information, e.g., about restricted access due to the secret nature of the publishing house. The financial section of the General Government, the main government of the Polish lands under German occupation, when sending budget plans for 1943 to the Prussian State Library, stated that the shipped volume "should be kept locked and not available to the public".<sup>10</sup> Letters sent in subsequent years of the war (often in the form of a postcard or on the back of a letter from Berlin librarians) more and more frequently contained information about the impossibility of fulfilling the obligation imposed on publishers. This was due to the lack of material resources (paper savings) and staff shortage. Usually, according to the analysis of the Jelenia Góra archives, the degree of work (e.g., final draft, project, files) and the place of their storage (e.g., archives or library) were indicated. It was sometimes added that these materials would be re-reviewed and published after the war. Although it does not seem very interesting, the correspondence highlights observations, informing us about the state of publishing and deteriorating conditions. The testimonies are interesting because they come from the German state and its local government institutions. For example, the mayor of Berlin's Tempelhof

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<sup>10</sup> "Ich bitte deshalb, den Band unter Verschluss zu halten und nicht der Öffentlichkeit zugänglich zu machen", Krakow, 17 August 1942, XI, p. 828. This kind of remark also concerned the semi-annual reports of the internal department management in the head of the Warsaw District office.

district, in a letter from July 1942, informed the management of the Prussian State Library that “subsequent annual reports of the Tempelhof district office will not be issued. They should not be expected to resume within the foreseeable future”.<sup>11</sup> Simultaneously, the main department of the Berlin Company Health Insurance (*Betriebskrankenkasse*) also explained that the newsletter’s suspension was “due to lack of people and the need to save paper”.<sup>12</sup> The high mayor (*Oberbürgermeister*) of Szczecin, also in July 1942, announced that the city’s statistical office would not publish its reports until the end of the war. He added that the manuscript of the report was submitted to the company’s archives.<sup>13</sup> Not long after, the mayor of Neurode im Eulengebirge (currently Nowa Ruda) announced that due to the lack of paper, the reports of the Neurode city office would not be published during the war. However, he added, “Whether publications will be possible after the war is impossible to predict today”.<sup>14</sup> In January 1943, the Mayor of Bischofswerder (now Biskupiec) wrote that no further articles on the city’s history would be published: “After the end of the war, it was planned to prepare a second part of the city’s history, but today it is not possible to predict whether it would be accomplished”.<sup>15</sup> In April 1943, the Academic Foreign Affairs Office at the University of Bonn (*Akademische Auslandsstelle*) reported that publications could not be sent until after the war: “the current headmaster has been appointed to the army. All office publications have been hidden and cannot be accessed. Nothing is left but to ask to send

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- 11 “Weitere Jahrgänge des Verwaltungsberichts der Bezirksverwaltung Tempelhof sind nicht erschienen. Fortsetzungen sind in absehbarer Zeit nicht zu erwarten”, XI, 384.
  - 12 “Während des Krieges werden infolge Personalmangels und mit Rücksicht auf die notwendige Papiereinsparung Geschäftsberichte nicht aufgestellt”, XI, 388.
  - 13 XI, 404.
  - 14 “Im Hinblick auf die Papierknappheit konnten die Verwaltungsberichte nicht mehr im Druck erschienen [...]. Ob nach dem Kriege wieder Veröffentlichungen möglich sein werden, lässt sich heute noch nicht voraussehen”, XI, 478.
  - 15 “Gedacht war, nach Beendigung des Krieges, den II. Teil der Stadtgeschichte anfertigen zu lassen, doch ist heute noch nicht übersehbar, ob es sich wird durchführen lassen”, XXIII, 34.

publications after the war”.<sup>16</sup> In May 1943, the mayor of Weinheim reported that publishing the historical journal *Weinheimer Geschichtsblatt* “would be possible only after the end of the Second World War”.<sup>17</sup>

The second group of files related to the mandatory copy that was supposed to be sent to the Berlin library, kept in the Jelenia Góra archives, consists of letters from military authorities. Here are some examples. At the end of October 1943, the High Command of the Armed Forces (*Oberkommando der Wehrmacht*) informed the archives about the next issues of the journal *Soldatenbriefe zur Berufsförderung*. By the end of 1943, it was intended to publish four volumes on zoology, botany, chemistry, and genetics in the agriculture series. The series contained articles for self-study and was addressed to soldiers to enable them to prepare for final high school exams, master exams, and entrance exams to higher vocational schools after the war.<sup>18</sup> In November 1943, the translation and training department of the High Command of the Armed Forces sent one copy of German-Slovenian, Turkmen, Hindustani, Georgian, and Persian pocket dictionaries. It was also noted that “this publication is for military service” and could not be made available to common readers.<sup>19</sup> In November 1943, the Ministry for Occupied Eastern Areas sent the previously published issues of the magazine *Казачьи ведомости* (*Kazach'i vedomosti*).<sup>20</sup> In November 1944, it reported that the previous editions had been out of print and that the publication of the journal *Kazak* (*Kazak*), the press body of the Cossack State

16 “Der bisherige Leiter der Akademischen Auslandsstelle befindet sich im Dienst bei der Wehrmacht. Sämtliche Druckschriften der Auslandsstelle sind provisorisch und unzugänglich untergestellt. Es bleibt also nur übrig, dass Sie Ihre Anforderungen nach Kriegsschluss wiederholen”, Bonn, 27 April 1943, XXIII, p. 82.

17 “Das Heft 19. und weitere Jahrgänge des Weinheimer Geschichtsblattes sind noch nicht erschienen; deren Erscheinen ist leider erst nach Beendigung des zweiten Weltkrieges möglich”, 3 May 1943, XXIII, p. 5.

18 XXIV, p. 23. Edelgard Bühler and Hans-Eugen Bühler, *Der Frontbuchhandel 1939–1945. Organisationen, Kompetenzen, Verlage, Bücher – Eine Dokumentation*, Frankfurt am Main 2002, pp. 197–198.

19 “Die Ausarbeitungen [dienen] nur dem militärischen Dienstgebrauch”, XXIV, p. 20.

20 11 November 1943. XXIV, p. 19.

(*Kosakenlager*, Казачий стан, *Kazachiy stan*), had been suspended. It was assured that subsequent editions of the new journal, *Казачья земля* (*Kazach'ya zemlya*), created after the relocation of some Cossack troops to northern Italy in July 1944, would be sent to the library on an ongoing basis.<sup>21</sup> Many of the magazines distributed by the army did not reach the Berlin library. On 22 October, the editors of the *Luftwaffe im Südosten* magazine, published in Vienna, reported the suspension of publication of the magazine: "the editorial rooms were damaged during one of the last bombings".<sup>22</sup> At the same time, they announced that airmen fighting in the South would receive the *Balkan - A. Z.* magazine, which would henceforth be addressed to all types of armed forces.<sup>23</sup> In November 1944, the Reich Commissariat for Occupied Norwegian Areas (*Reichskommissariat für die besetzten Norwegischen Gebiete*) informed the library that the entertainment magazines issued for soldiers fighting on the Northern Front were out of print.<sup>24</sup>

The third and final group consists of bulletins and newspapers published in prisoner-of-war camps and sent to the library. Correspondence concerning this matter is mixed with letters regarding other publications in the folder marked with reference number 28 ("Correspondence regarding the acquisition of official publications"). At the end of 1944, the librarians of the Berlin library intensified their efforts to supplement the war collection. They sent letters to the commanders of prisoner camps asking them to send the library newspapers and brochures issued in stalags and offlags. For example, on 14 November 1944, a commander located in the Fallingbostel Stalag XI B received a letter saying: "Please send the numbers issued so far and send those that will appear in the future on a regular basis. If individual issues were no longer available,

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21 Berlin, 21 November 1944, XXIV, p. 3.

22 "Die Redaktionsräume wurden bei einem der letzten Luftangriffe schwer bombardengeschädigt", XXVIII, p. 44.

23 XXVIII, p. 50.

24 XXVIII, p. 48.

please provide information on this matter".<sup>25</sup> Single issues were usually sent to Jelenia Góra, with a letter informing them that the rest were out of print or printing was suspended.<sup>26</sup> Sometimes, more detailed reports were sent. At the end of December 1944, the prisoner-of-war camp in Villingen (Stalag V C) in Schwarzwald received a report that it was impossible to send the newspaper *Espoir* published there. As the headquarters informed, "all copies were destroyed as a result of enemy actions".<sup>27</sup> On 11 January 1945, the commandant of Stalag II D in Stargard reported that he could only send the first issue of the camp newspaper *Il Ruscello*. Shortly after it was published, he wrote, Italian prisoners of war were sent to work and became subject to civil authority. "The first issue is the only and the last issue at the same time".<sup>28</sup> A similar case was reported by the commander of the Stalag VIII B in Cieszyn, in which the newspaper *Il Piffero* was published. In this case, too, Italian interned soldiers had become subject to civilian authority.<sup>29</sup>

It should not be forgotten that the files found in the Jelenia Góra department of the State Archives in Wrocław constitute only a small part of the correspondence sent to the acquisition department. In spring 1945, the rest, as already mentioned, were taken to Berlin. There is no trace of an exchange of letters regarding the mandatory copy of fiction, scientific literature, etc. Only a small part of the letters preserved in the collection was written in Jelenia Góra or sent there. For the most part, we are dealing with documents from before 1944, which were later transported to Jelenia Góra from Berlin. Although they do not provide information on the working conditions of German librarians in Jelenia Góra, the files give an idea of their determination in attempts to gather as many

<sup>25</sup> "Die Staatsbibliothek [...] bittet darum, ihr die bisher erschienenen Nummern zu überweisen und sie für die regelmäßige Lieferung der künftig erscheinenden vorzumerken. Sollten einzelne Stücke nicht mehr verfügbar sein, wäre der Staatsbibliothek mit kurzem entsprechenden Bescheid gedient", XXVIII, p. 17.

<sup>26</sup> XXVIII, pp. 1-15.

<sup>27</sup> Sämtliche Exemplare [wurden] durch Feindeinwirkung vernichtet, XXVIII, p. 24.

<sup>28</sup> "Die erste Nummer ist dadurch die einzige und letzte geblieben", XXVIII, p. 21.

<sup>29</sup> XVIII, p. 22.

documents illustrating war operations as possible. The letters that came to the library also shed light on social moods that indicate the growing wave of defeatism. It is worth noting that parcels also arrived at the Berlin library address after the end of the Second World War. The head of the Jelenia Góra Municipal Archives, Eugenia Triller, in a letter from the end of 1949, probably addressed to the regional authorities, pointed out that the institution she was managing had received a parcel sent by the Swiss Ethnographic Society. The recipient was the Prussian State Library:

it raises various doubts. [...] Today, when more than four years have passed since the end of the war, a letter in German addressed to an institution that does not exist, arrives [...]. Is the scientific society, *Gesellschaft für Volkskunde*, unaware to this day about shifting borders and that the Silesia region returned to the motherland?<sup>30</sup>

As mentioned, documents kept in folders marked with reference numbers 15–22 may serve as an example on manuscripts and prints coming to the Berlin library apart from the mandatory copy. Some of the titles given by archivists are misleading. This applies to the volumes of “Correspondence with bookstores and other institutions on matters related to the purchase of publications” (15–18) and “Correspondence with foreign institutions regarding matters related to acquisitions” (19–20), which include, among other things, letters exchanged with the military and police authorities of the German state. Folder no. 21, *Oberkommando der Wehrmacht, correspondence regarding library acquisitions as spoils of war in Russia*, contains information on books confiscated by German military troops in the Soviet Union and then sent to the Prussian State Library. Volume No. 22, entitled *Wehrmacht-Sichtungsstelle (Beutenaakten)*, collects files about books and manuscripts taken in other European countries under German occupation. These files can be divided into two categories: correspondence with civil institutions and correspondence with military and police authorities of the German state.

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30 AP Wrocław, Archiwum Miejskie w Jeleniej Górze, IX, p. 69.

The first includes letters on doublets (exchanged with libraries of German and West European universities, scientific institutions, and diplomatic service in the Second World War). In many cases, the items offered to the Berlin library could have been stolen. Such suspicions concern, among other things, a package of thirty-five books on religious matters sent in March 1942 by the Library of the Ministry of Science and Education (*Reichsministerium für Wissenschaft, Erziehung und Volksbildung*) as a gift (*Geschenkgabe*).<sup>31</sup> This group also includes correspondence with German, French, Belgian, Dutch, and Danish antiquarians (among others, the Amsterdam company Swets en Zeitlinger, Berlin's Hans Hartinger Nachfolger, Kiel's Lipsius und Tischer, Munich's Theodor Ackermann, in Paris: Librairie E. Droz. Livres d. Livres d' Érudition français et étrangers, Librairie Rive Gauche, Librairie Orientaliste Paul Geuthner, Prague's K. Andresche Buchhandlung). There is a noteworthy letter from the Copenhagen antiquarian, Einar Munksgaard, who in February 1940, barely a few weeks before the arrival of German soldiers in Denmark, offered the Berlin library his services. "I thought", he wrote to the library director, "that you might be interested in books about war, coming out in both neutral and hostile countries. I allow myself to send a list of outgoing publications in the Scandinavian countries".<sup>32</sup> There is no information in the files on whether Spree decided to cooperate with Munksgaard.

The second category of files kept in the Jelenia Góra archives of the Prussian State Library consists of materials presenting the acquisition of books confiscated by the military and police authorities of the Third Reich. Below, I describe selected documents, indicating the types of institutions, ways of obtaining books, etc. It should be remembered that only a small part of the documentation remaining in Jelenia Góra illustrates the illegal acquisition

31 XIX, 42, book index, 43.

32 "Da ich mich denken konnte, dass die im neutralen Ausland und im feindlichen Ausland erschienenen Kriegsbücher für Ihre Bibliothek Interesse haben, erlaube ich mir, Ihnen anbei eine vorläufige Liste über skandinavische Publikationen zu senden", XVII, p. 139.

of the Berlin library in accordance with international law (this is evidenced primarily by the signs on the sent letters bearing order numbers). The materials stored here, although they do not allow us to explore the full scale of the activities of all the authorities of the Third Reich involved in the robbery of works of art, give an idea of the cooperation of librarians with the army, police, and other institutions of the German state. They also indicate places where further searches should be carried out in the archives of individual institutions. However, due to incomplete documents, it is impossible to assess the extent to which Berlin library employees took part in trafficking illegally acquired manuscripts and prints. The German historian Cornelia Briel made a thorough study of the Jelenia Góra files in her important and valuable work on Reich's Exchange Office (*Reichstauschstelle*).<sup>33</sup> She recalled that both the Exchange Office and the Prussian State Library were largely supplied with books that had been stolen.

As the Jelenia Góra files show, the confiscated works were sent to the Berlin library via various military institutions. Sometimes, books were sent directly by the commanders of individual units. For example, at the end of January 1940, the head of the archives under the command of the 21<sup>st</sup> Army Corps stationed in Wielkopolska sent "a certain number" of books in Georgian and Polish about sports. He also included French novels - "those of political significance", he declared.<sup>34</sup> The package either did not include a list of the books sent, or it is missing in the Jelenia Góra archives. Less than two weeks later, the head of the acquisition department, Al-

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33 Cornelia Briel, *Beschlagnahmt, erpresst, erbeutet. NS-Raubgut, Reichstauschstelle und Preußische Staatsbibliothek zwischen 1933 und 1945*, Berlin 2013. The author, researching everything in detail and often referring to individual books, was not always able to see the deeper meaning of the problems discussed. In many places, she also assumed that the files from Jelenia Góra were complete. Hence, it is necessary to review at least a few of her theses. Briel also conducted research in the archival files preserved in the Staatsbibliothek zu Berlin without reflecting on the state of their completeness. The German historian did not take the trouble to research other archives, especially military archives, to verify her hypotheses.

34 Eine Anzahl von Büchern; "einige französische Romane, von denen einer politische Bedeutung hat", XV, p. 128.

exander Schnütgen, acknowledged the receipt of confiscated books in Georgian, Polish, and French sent by the command of the 21<sup>st</sup> army corps stationed in Wielkopolska. A response draft has been preserved in Jelenia Góra.<sup>35</sup>

Much more often, however, this was done by the Sichtungsstelle that specialised in reviewing and pre-assessing the value of confiscated materials. Thanks to this, as evidenced by the files from the Jelenia Góra collection, books from all occupied European territories were sent to the Berlin library. This group includes mostly letters from 1942–1943. The book package was accompanied by a short cover letter, usually beginning with the words: “Among the confiscated materials, the items described below are sent” or “Assuming the library would be interested in (or because of the value), the following seized materials are sent to be included in the collection”.<sup>36</sup> The operational area (“Ostraum”, “Westraum”, “Südraum”), country of origin, and language were given. Only one book in Polish was found: the second volume of the botanist Krzysztof Kluk’s, *Roślin potrzebnych, pożytecznych, wygodnych, osobliwie krajowych albo które w kraju użyteczne być mogą, utrzymanie, rozmnożenie i zażycie* (*The maintenance, reproduction and usage of plants that are necessary, advantageous, convenient, indigenous or locally useful*). We do not know where it was stolen from. It was probably not included in the Prussian State Library collection, and it is not in the catalogue of the Berlin library (which also records items considered to be war losses). Briel has studied this correspondence. Although she had to have been aware that the files preserved in Jelenia Góra are only part of the documents depicting the circulation of robbed books,

<sup>35</sup> XV, p. 127. Contrary to Briel’s supposition (*ibidem, Beschlagnahmt, erpresst, erbeutet...*, p. 292), the grammar of Georgian, Chechen, Kumykan, Buryat, Agulan, Nogaj, and Kabardian languages was not sent directly from the front, but via the Supreme Command of the Land Forces. The cover letter attached to the parcel was sent in mid-November 1942 from the main headquarters of the Supreme Command, XXI, p. 1.

<sup>36</sup> “Aus beschlagnahmtem Material wird das in den Anlagen näher bezeichnete übersandt”; “In der Annahme dortseits bestehenden Interesses wird zum dortigen verbleib beifolgendes Beutegut übersandt”.

she tried to give the impression that only the volumes described on the files in Jelenia Góra were sent to the Berlin library. As a result, her calculations, based on materials only partially preserved, may drastically underestimate the scale of the robberies. It is worth quoting a longer passage here:

In December 1940, the Wehrmacht Supreme Command transferred [...] a collection of French legal texts. A total of 22 volumes, some of which may have been included in the collection. The next letter came a year later, dated January 8, 1942, together with it the Prussian State Library received two works robbed in Greece. These certainly were not included in the collection. Another work submitted was a Dutch collection of laws [...], which was sent to the library on 27 October 1942.<sup>37</sup>

Based on these facts, Briel concluded that “from 1941 or 1942, employees of the acquisition department acted in accordance with the recommendation that robbed works should not be included in the collection”.<sup>38</sup> Her unspoken observation about the relatively small number of deliveries and her claim that books stolen by Wehrmacht were not included in the collection any more were based on an accidental fragment of the documents of the institution that did not determine the German cultural policy. A possible confirmation of this hypothesis would require intensified searches in military archives. This would be feasible because the files of the *Sichtungsstellen* are largely preserved and stored in the Freiburg im Breisgau department of the German Bundesarchiv (*Abteilung Militärarchiv*). Briel did not carry out research in military archives.

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37 “Im Dezember 1940 überwies das Oberkommando der Wehrmacht [...] eine Sammlung französischer Gesetzestexte [...] – insgesamt 22 Bände, von denen möglicherweise einige akzessioniert wurden. Das nächste Schreiben in der Akte ging ein Jahr später ein und datiert vom 8. Januar 1942. Mit ihm erhielt die Preußische Staatsbibliothek zwei in Griechenland geraubte Werke, die nun schon nicht mehr akzessioniert wurden. [...] Das nächste überstellte Werk war eine niederländische Gesetzesammlung [...], die am 27. Oktober 1942 an die Preußische Staatsbibliothek abgesandt wurde”, Briel, *Beschlagnahmt, erpresst, erbeutet...*, pp. 291–292.

38 Briel, *Beschlagnahmt, erpresst, erbeutet...*, pp. 292–293.

Publications and books were also shipped to the Berlin library via military libraries. In June 1942, according to files preserved at the Jelenia Góra department, twelve books in Czech arrived in Berlin, which were doublets of the military library in Prague (reference numbers were in the letter informing about the shipment).<sup>39</sup> In June 1943, the head of the library network at the command of the German army in the Netherlands sent eight books in Dutch (as in the case described above, reference numbers were also noted down).<sup>40</sup> Other military institutions were also involved. For example, in March and April 1941, a shipment containing more than two hundred books from the “small French library which was taken over” was sent to the Prussian State Library from the Aviation Academy.<sup>41</sup> In the files preserved in Jelenia Góra, I did not find traces of cooperation with other military libraries. When describing the mediation of military libraries, Briel takes the position that only a dozen or so volumes were sent to the Prussian State Library in this way.<sup>42</sup> As in the case described above, confirmation of this assumption would require research in German military archives.

The Jelenia Góra archives also contain files documenting book packages from the Berlin department of Abwehr, which reviewed the confiscated publications. In February 1940, a dozen or so books in Chinese and Russian were sent to the Berlin library. As reported in the letter, “foreign postal items taken over by confiscation may be available to the State Library”.<sup>43</sup> The Chinese-English chemical dictionary and Russian ABC’s were registered as donations (“dona”) and received reference numbers. The other books, the English-language guide for Chinese language teachers and the *Children’s Worship Book* published in Chinese, were forwarded, after

39 XX, p. 71. Briel, *Beschlagnahmt, erpresst, erbeutet...,* p. 294.

40 XIX, p. 110.

41 XV, 56–57, book index 57–66. According to Briel’s study (eadem, *Beschlagnahmt, erpresst, erbeutet...,* p. 264–265) they were not included in the collection.

42 Briel, *Beschlagnahmt, erpresst, erbeutet...,* pp. 292–293.

43 “Der Staatsbibliothek können aus beschlagnahmter Auslandspost die nachfolgenden Werke zur Verfügung gestellt werden”, XV, p. 9.

a telephone consultation with the Berlin Abwehr, to the oriental departments of the Reich Exchange Centre.<sup>44</sup> On 29 May 1941, other books confiscated in France were sent from the Berlin department of the Abwehr reviewing confiscated publications. Three volumes (1, 5, 8) of the Paris world exhibition report *Exposition internationale des arts et techniques dans la vie moderne*, (1937). *Rapport général* are especially interesting. Reference numbers were not provided.<sup>45</sup> In all probability, they were included in the library collection. In the Berlin library's catalogue, under reference number 4, "Ooa 13/65", we find the three volumes indicated above. However, this cannot be confirmed: these copies, according to the information contained in the electronic catalogue of the State Library in Berlin, were lost during the war (*Kriegsverlust*). In all likelihood, this means that the illegally acquired volumes, which were essentially a war loss for France, were considered to be the Berlin library's own losses. On 12 June 1941, according to the files in Jelenia Góra, the German intelligence service operating in France via the Berlin mission, sent one hundred and twenty volumes of *Bulletin des lois de la République Française*, which had been confiscated.<sup>46</sup> On a sheet of paper attached to the letter, it is written that "these volumes have been deposited in a manuscript deposit and will not be processed yet".<sup>47</sup> Based on this note, Briel concluded that the management of the Prussian State Library slowly ceased to be interested in the books they received from military, police, and other institutions did not include them in their collections and waited for post-war decisions.<sup>48</sup> It seems much more likely that they did not know what to do with such a large number of volumes. It must be assumed that the remark was related to *Bulletin des lois...* and not war acquisitions at all.

44 XV, p. 9. Cf. Briel, *Beschlagnahmt, erpresst, erbeutet...*, p. 288.

45 XV, p. 7.

46 XV, p. 2. *Spis skonfiskowanych tomów* [List of the confiscated volumes], pp. 3-5.

47 "Die Stücke sind zunächst im dermaligen Handschriftenmagazin gelagert worden und werden bis auf weiteres nicht verarbeitet", 17 June 1941, XV, p. 1.

48 Briel, *Beschlagnahmt, erpresst, erbeutet...*, p. 288

The documents gathered in Jelenia Góra show that German librarians did not just wait for packages with confiscated literature. They were actively involved in the acquisition of manuscripts and publications. Hermann Fuchs, an employee of the Berlin library during the occupation of France, can serve as an example. He was the head of the library protection department (*Biblioteksschutz Department*) under the military command in France (*Militärbefehlshaber in Frankreich*). Briel described Fuchs's activities, his contacts with Parisian antiquarians and booksellers, and ways of obtaining interesting books from the Prussian State Library.<sup>49</sup> In the Jelenia Góra collection, Fuchs's correspondence from November 1940 to February 1944 is under reference number 16 (pp. 79–248). One of the first tasks entrusted to Fuchs was to take good care of the shipment of books confiscated in France on the basis of Otto's list ("Ouvrages retirés de la vente par les éditeurs ou interdits par les autorités allemandes"), a list of prohibited books developed by the German ambassador in occupied France, Otto Abetz, in cooperation with French publishers.<sup>50</sup> At the beginning of December 1940, the head of the acquisition department Alexander Schnütgen sent Fuchs a list of books that the Prussian State Library was interested in acquiring. The history of how the books were to be shipped by Fuchs is very interesting. According to the files preserved in Jelenia Góra, after arriving in Berlin, the confiscated publications meant for the Berlin library were most probably taken over by the Reich Main Security Office (*Reichssicherheitshauptamt*). It was not until May 1942 that the employees of the latter informed the libraries about the shipment of books from France. They insisted on picking up two boxes as soon as possible, "because the warehouse is already overloaded". Paul Geißler, who studied and filed the confiscated books, wrote with a pencil on a letter from RSHA: "The package is already being labelled. The books only partially overlap with *Otto's list*".

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49 Ibidem, pp. 265–282.

50 Natalie Zemon Davis, *Liste Otto. The Official List of French Books Banned under the German Occupation, 1940*, Cambridge 1992.

However, these are not the best boxes prepared for us by Fuchs".<sup>51</sup> We do not know what happened to the remaining works that were confiscated. In December 1941, the aforementioned Schnütgen, in a letter to the head of the Reich Exchange Center, confirmed the library's activity in this area. He declared that "he would like to receive bibliographic aids and other publications issued by antiquarians and booksellers, as well as one copy of all books that did not end up in the library as a mandatory copy".<sup>52</sup> There is no trace of confirmation in Jelenia Góra that he received them.

Among the institutions subordinate to the Reich Main Security Office, it is worth noting the Secret State Police (*Geheime Staatspolizei*, Gestapo) - the correspondence with which is preserved in the Jelenia Góra archives. In the first days of July 1941, the Königsberg Gestapo, via the Central Trust Office East (*Haupttreuhandstelle Ost*), asked the Berlin library whether they were ready to take over volumes confiscated from the employees of the Polish consulate in Königsberg. It is impossible to determine whether a list of books was attached to the shipment, but we know there were a box and three chests. However, there was one condition: the Berlin library was to cover shipping costs.<sup>53</sup> Just a few days later, the library replied and accepted incriminated books.<sup>54</sup> The books were sent, but the Berlin library did not pay postage. In January 1942, the Central Trust Office sent an admonishment to the Berlin library, indicating the need to reimburse the Gestapo for shipping costs in the amount of 36.60 marks.<sup>55</sup> A few further examples can be given.

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51 "Die Sendung ist bereits im Hause und in Bearbeitung. Die Bücher decken sich nur z. T. mit der ‚Liste Otto‘, es handelt sich nicht um die besten von Dr. Fuchs für uns bestimmten Bücherkisten", Brief (eadem, *Beschlagnahmt, erpresst, erbeutet...*, p. 267), was wrong when stating that boxes reached the Berlin library in May 1943. It happened a year earlier, XVIII, p. 16.

52 "Nach wie vor möchte die Erwerbungs-Abteilung bei der Sortierung der Bücher einmal die bibliographisch-buchhändlerischen Hilfsmittel, die sich bei ihnen befinden, und weiter vorerst je ein Stück aller Bücher des Sortiments, die nicht in einem Pflichtverlag erschienen sind, überwiesen erhalten", XVII, p. 24.

53 XVI, p. 343.

54 XVI, p. 342.

55 XVI, p. 340.

Berlin librarians actively cooperated with the secret police by sending lists of desired titles to the Gestapo. In January 1942, the Berlin department of the secret state police sent a letter to the library, along with a dozen or so prohibited foreign books they had ordered, in which they apologised they were not able to fulfil their task because from “the list sent on 29 October 1941 the following copies were available”.<sup>56</sup> Similarly, in January 1943, in a letter sent to the Berlin Library, it was reported: “attached are seven ordered books”.<sup>57</sup> Except for one book, which turned out to be a doublet, all the books received reference numbers. The Prussian State Library also received books stolen and confiscated without prior order. For example, in March 1942, the Berlin Gestapo received thirty-two brochures from the Vienna Gestapo.<sup>58</sup> The fate of publications in Yiddish and Hebrew requires further investigation. In July 1941, the Berlin Gestapo informed the library about the shipment of four books confiscated by the Nuremberg-East Tax Office (*Finanzamt Nürnberg-Ost*). Nuremberg officials decided to keep them “because of their antiquity and probable bibliophile value”. Berlin library employees were asked to help evaluate them. They added that “these four books were probably of Jewish property”.<sup>59</sup> The fate of these books is unknown. Briel hypothesised that “it is not yet clear whether the Reich Main Security Office sent the so-called Judaica and Hebraic to the Prussian State Library”.<sup>60</sup> The case undoubtedly requires in-depth research, especially since in 1945, as Briel herself writes a few paragraphs below, in the American occupation zone (Marburg, Offenbach), several thousand books taken away from Jewish owners were secured and sent to the Berlin library during the war.<sup>61</sup>

56 XVIII, p. 190.

57 “Anliegend übersende ich sieben der gewünschten Druckschriften”, XIX, p. 46.

58 XVIII, p. 183.

59 “4 Bücher [...], die vom Finanzamt wegen ihres Alters und ihres etwaigen bibliophilen Wertes zurückbehalten wurden [...]. Die vier Bücher stammen wahrscheinlich aus jüdischem Besitz”, XVIII, p. 193.

60 “Es ist noch ungeklärt, ob das Reichssicherheitshauptamt sogenannte Judaica und Hebraica an die Preußische Staatsbibliothek weitergeleitet hat”, Briel, *Beschlagnahmt, erpresst, erbeutet...*, p. 210.

61 Ibidem.

The correspondence between the Berlin library and the Central Customs Office in autumn 1939 testifies that books taken away from Jewish owners were sent to the Prussian State Library (and, at the same time, showed that other institutions of the German state were also engaged in this). In October 1939, customs officers in Düsseldorf informed the Berlin library: "We have here confiscated Jewish and Hebrew books". The Office requested them to assess the value of several volumes, some of which, among others, was the Hasidic prayer book, *Siddur Sefat Emet* and the correspondence of Walter Rathenau.<sup>62</sup> In November 1939, the Prussian State Library replied that "the library is not interested in them. Please take care of their destruction".<sup>63</sup>

The review of the Berlin correspondence with the military and police authorities of the Third Reich cannot lead to general conclusions. The files preserved in Jelenia Góra refer only to a certain part of the activity of the acquisition department, and they should be interpreted together with the files preserved in Berlin, as well as archives of institutions involved in the theft of books and, more broadly, works of art. Despite this, they reflect certain tendencies and clues about the German policy of stealing cultural goods during the Second World War.

It is worth adding that under No. 2 (according to the inventory), one can find further editions of the monthly *Unsere Staatsbibliothek* issued by the Berlin library. The journal included news on the library's current work, activity reports, data on acquisitions of the war collection created in September 1939 (modelled on the collections of the wars 1870–71 and 1914–18), information about library employees serving on the war front (fronts), and their letters. Particularly interesting is the regular article "From our soldiers" ("Von unseren Soldaten"). In the December issue, we can read the account of Walter Bonnke ("From old Poland"):

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62 XVI, p. 335.

63 "Die aufgeführten beschlagnahmten jüdischen und hebräischen Schriften [kommen] für die Staatsbibliothek nicht in Betracht. Ich bitte deshalb, ihre Vernichtung veranlassen zu wollen", XVI, p. 334.

I immediately started to collect all kinds of news and notifications (e.g. regarding mobilization, air attacks, announcements of the main command to civilians). However, my backpack is not the best place to store this kind of documents [...]. I hope that if I get a vacation, I will be able to bring it all with me [...]. In addition to the Warsaw University Library, I found two more libraries in the city, but I couldn't visit them because nobody could tell me where the gate keys were. They look undamaged. One of them is located in a building in which a foreign embassy is located [...], the other one in the Old Town square, where there are beautiful houses, completely undamaged.<sup>64</sup>

In the January 1940 issue, we find information about attempts to learn Polish. E. Bielefeld reported:

Metoula-Sprachführer fills an important gap because for many weeks we have been stationed in small groups in villages and we are in constant contact with the Polish-speaking population, and we have no other choice but to constantly translate. After all, it's interesting how this or any other German word sounds in Polish. A small booklet is always at hand, all soldiers look it up.<sup>65</sup>

It was not common among the Berlin library employees to be interested in Polish affairs. We read in a letter by Otto Dimde:

64 "Ich habe mich auch gleich an das Sammeln von Plakatanschlägen u. ä. gemacht und einiges, wie z. B. die polnische Mobilmachungsbekanntmachung, den polnischen Aufruf zum Luftschutz und die Bekanntmachungen des Oberbefehlshabers an die Zivilbevölkerung erhalten. Nun ist ja mein Tornister ein schlechter Ausbewahrungsort für diese Plakate [...]. Hoffentlich bekomme ich mal Urlaub, dann bringe ich sie mit [...]. Außer der Warschauer UB habe ich in der Hauptstadt noch zwei Bibliotheken aufzufindig gemacht, aber nicht besichtigen können, weil mit niemand sagen konnte, wer den Schlüssel zum Tor besitzt. Sie scheinen aber beide unversehrt zu sein, weil die eine sich in einem Hause befindet, dessen obere Etagen von einer fremden Gesandtschaft bewohnt werden, [...], und die andere am Alten Markt mit den schönen Häusern, die überhaupt nicht durch die Beschießung gelitten haben", *Unsere Staatsbibliothek. Monatliche Mitteilungen*, 13 December 1939, pp. 1-2.

65 "Der kleine Metoula-Sprachführer ‚Polnisch‘ fällt eine große Lücke aus, denn da wir nun schon seit vielen Wochen in kleinen Gruppen auf Dörfern und Gütern verteilt leben und in stetem Verkehr mit polnisch sprechender Bevölkerung stehen, sind wir immer wieder mal auf Verdolmetschung angewiesen. Außerdem reizt es ja an sich, zu wissen, wie dieses oder jenes deutsche Wort auf Polnisch heißt. Das kleine handliche Büchlein liegt stets griffbereit und ist bereits - auch von den Kameraden - viel benutzt worden", *Unsere Staatsbibliothek. Monatliche Mitteilungen* 15 January 1940, p. 1.

After all that we saw in Poland, everything in the homeland is a thousand times better than in Poland. There is a lack of the most basic things there, not enough water, salt, sugar, or electricity. The conditions in which Poles live cannot be compared with German ones. A simple German lives in his hut like a prince [...]. There is still a lot to do in Poland if this country was to be equal with Germany to some extent.<sup>66</sup>

In turn, Karl Wuttig wrote: “We visited a German colony on the Vistula river, listened to the stories of local farmers who had not seen Germany for five generations. It is surprising that they have kept such a clear knowledge of German. Their homes, compared to Polish homes, are real jewellery boxes”.<sup>67</sup> The author of the letter was not interested in whether the Germans living in Poland were subject to occupational rigours or were treated as citizens of the Reich. In general, when comparing living conditions in occupied Poland and Germany, he did not notice the war regime.

To conclude, it should be said that reference numbers 26–27, 29–60 (and part of 25) contain files of very different provenance, some of which are only slightly connected with the war history of the Berlin library and its department in Jelenia Góra. Most often, these are documents brought to Jelenia Góra by employees; e.g., I assume that this is the case with the list of doctoral dissertations in Erlangen and Tübingen in the interwar period, reference number 25, short stories by Manfred Bökenkamp, and correspondence regarding the publication in C. Bertelsmann Verlag Gütersloh (reference number 34

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- 66 “Nach allem, was wir in Polen gesehen haben, ist es in der Heimat tausendmal besser als in Polen. Dort gab es nicht die primitivsten Dinge, weder genügend Wasser, Salz, Zucker noch Beleuchtungsmittel, Das Leben der polnischen Bevölkerung lässt sich in keiner Weise mit dem der Deutschen vergleichen. Der einfachste deutsche Mensch lebt in seiner Hütte wie ein Fürst [...]. IN Polen gibt es also noch sehr, sehr viel zu tun, wenn dieses Land dem deutschen einigermaßen angeglichen werden soll”, *Unsere Staatsbibliothek. Monatliche Mitteilungen* 17 February 1940, p. 1.
- 67 “Am Sonntag haben wir eine deutsche Siedlung an der Weichsel aufgesucht und uns von den Bauern, die seit fünf Generationen Deutschland nicht mehr gesehen haben, von ihren Erlebnissen erzählen lassen. Man muss sich wundern, dass sie die deutsche Sprache sich so rein erhalten haben. Ihre Häuser sind gegenüber den polnischen reine Schmuckkästchen”, *Unsere Staatsbibliothek. Monatliche Mitteilungen* 19 March/April 1940, p. 1.

“Manuscripts and leaflets on various issues”), current documentation (e.g., vacation applications, reference number 30 “Index of Books”), draft versions of the acquisition journal (section “Krieg 1939”, “Ys”, reference number 29, “Index of Books”).

A fairly accidental collection of documents on the wartime fate of the Jelenia Góra department of the Prussian State Library in Berlin, which remained at the foot of the Sudetes mountains after 1945, provides valuable information on supplying new items to the collections of the Berlin’s library in the era of the Second World War, and, in this context, German cultural policy in general. It also encourages students to study fragmentary or scarce archives that seem not to promise much but may help to increase our knowledge about the fate of Polish libraries and book collections in 1939–45.

*Translated by Alicja Rosé*

## SUMMARY

In the Jelenia Góra department of the State Archives in Wrocław is stored a small part - consisting of 60 archival units - of the current records (Registratur) of the Prussian State Library in Berlin (Preußische Staatsbibliothek) from the years 1939–45. It is a remnant of the office of the Berlin library: catalogue and acquisition departments which operated in the foothills of the Karkonosze mountains in the last months of the Second World War.

The first main group of files contain correspondence regarding the mandatory copy (5–14, 23, 24, 27, partly 25 and 28). Along with the transfer of the acquisition department to Jelenia Góra, correspondence regarding the mandatory copy was sent as well. Files preserved in Jelenia Góra can be divided into three groups: concerning the official prints from 1936–1944, correspondence with the military authorities, bulletins and newspapers published in prisoner-of-war camps. The second main group consists of files illustrating the process of obtaining by the Berlin library of manuscripts and prints during the war apart from the mandatory copy (numbers 15–22). These files can be divided into two categories:

correspondence with civil institutions as well as military and police authorities of the German state.

The aim of this article is firstly to present the archival fonds “Prussian State Library Department in Jelenia Góra” and to indicate its historical value; secondly, to discuss issues that complement our knowledge on the Berlin library’s war activities in the field of acquisition; thirdly – perhaps most importantly – to show clues for further archival searches.

**KEYWORDS:** Second World War; cultural policy of the Third Reich; Prussian State Library in Berlin; Off-site centre in Jelenia Góra (Hirschberg)

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# PUBLISHING ACROSS BORDERS: THE POLISH DISCUSSION OF LITERARY PROPERTY AND COPYRIGHT IN THE ERA OF THE BERNE CONVENTION

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## INTRODUCTION

This article presents the findings of research into how literary property and copyright were viewed by Polish publishers and writers in the era of the negotiation of the Berne Convention.<sup>1</sup> In countries with advanced publishing markets such as England, France, or Germany, the discussion over the concept of literary property was initiated in the 18<sup>th</sup> century, and by the time the Berne Convention was negotiated and signed, those countries had already established discursive traditions in this field. In Congress Poland, discussions of this topic started later, in the second half of the 19<sup>th</sup> century, spurred by the rapid growth of a Polish publishing move-

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<sup>1</sup> The project *Literary property and copyright in Poland in the time of Berne Convention* was financed by the Polish National Science Centre (project number: 2014/15/B/HS2/00082). This article synthetically summarises the most important results of a research project. For a broader and more detailed presentation, see T. Święćkowska, *Kochani krwiopijce. Własność literacka i prawo autorskie w XIX-wiecznej Polsce*, Universitas, Kraków 2018.

ment with a centre in Warsaw.<sup>2</sup> The Polish publishing market was shaped not only by relatively late commercialisation but also by the fact that it developed under three different administrative and legal systems, without the support of a national state but with a strongly defined mission of the printed word. The Polish cultural élites who inhabited a vast area divided between Russia, Austria, and Prussia since the end of the 18<sup>th</sup> century saw the public reproduction of Polish language and culture as a means to organise the survival of a stateless nation. A stable publishing market was seen not only as an economic asset but also as an important stake in the political struggle. One of the important factors of the growth of the Polish publishing market was unauthorised translations of foreign literature, which was also one of the main points of controversy in the negotiating process for the Berne Convention.

### THE POLISH PUBLISHING MARKET IN THE 19<sup>TH</sup> CENTURY

Most studies of 19<sup>th</sup>-century Polish publishing focus on one partition only. The timeframes of those studies are defined by key political events, wars, and uprisings, which also had an impact on the situation of writers and publishers, the ever-moving borders, and the changing censorship systems.<sup>3</sup> But even though each of the three publishing markets had its own dynamics, with varying degrees of political repression or economic situation, they behaved as parts of one linguistic and cultural whole. At times, it was very difficult to distribute literary products across partition borders, but it was not impossible. Information, ideas, and also books, journals, and pamphlets penetrated borders and circulated in sometimes strange ways.<sup>4</sup>

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- 2 This was also a time of economic revival in Congress Poland, accompanied by an upswing in readership figures, development of Professional authorship, and a general acceleration of the processes of the commercialisation of literature.
  - 3 The important historical events influencing Polish book publishing included the Napoleonic Wars, the Congress of Vienna, the November Uprising (the Polish armed rebellion against the Russian Empire in 1830–31), the Revolution of 1848, the January Uprising of 1863 in the Kingdom of Poland, and the Russian Revolution of 1905.
  - 4 For example, Polish publishers from Galicia in the Austrian partition did not send books to Poznań in the Prussian partition directly but via Munich. W. Gottlieb, "Z doli i niedoli księgarstwa polskiego przed r. 1918", *Przegląd Księgarski* 1933, no. 25, pp. 187–192.

Throughout the first half of the 19<sup>th</sup> century, the Polish publishing market remained economically weak, and printers lacked sufficient capital to increase circulation. In Warsaw, no more than 100 books per year were published in the late 1820s, and in the 1830s, after the November Uprising, even fewer titles appeared in print.<sup>5</sup> Popular schoolbooks and calendars had a circulation of up to 1,000 copies, while novels translated from French usually appeared in 500 to 700 copies.<sup>6</sup> Publishers shied away from editorial risk, so Polish authors took on editorial tasks themselves, taking manuscripts to the printers, deciding about the form and cost of publications, and supervising their print. One of the main forms of publishing literary or scientific works in the Polish territories in the first half of the 19<sup>th</sup> century was subscription publishing.<sup>7</sup> In that era, writing and publishing books in Polish was considered a patriotic activity aimed at upholding and reproducing national culture and seen as a moral contribution. Subscription announcements appealed to the sense of duty to preserve and support national culture.

The most important works of Polish romanticism were written in the 1830s outside of the Polish territories by authors living in exile after the defeat of the November Uprising. Their works could not be printed or sold in Poland, especially in the Russian partition, but they were smuggled in.

Literary production on the Polish territories revived in the 1850s and then grew significantly over the last three decades of the century, mainly thanks to the development of the press and serial publications in newspapers and journals.<sup>8</sup> The centre of publishing

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- 5 K. Estreicher, *Bibliografia polska od 1800 do 1862*, *Gazeta Polska*, Warszawa 1863, p. 40.
  - 6 J. Kamionkowa, *Życie literackie w Polsce w pierwszej połowie XIX w.*, Państwowy Instytut Wydawniczy, Warszawa 1970, p. 177.
  - 7 According to E. Śłodkowska, between 1815 and 1830, at least one third of Polish publications were sold as subscriptions. E. Śłodkowska, *Produkcja i rozprowadzanie wydawnictw w Królestwie Polskim w latach 1815–1830*, Biblioteka Narodowa, Warszawa 2003.
  - 8 In the Kingdom of Poland, the number of journals titles grew threefold between 1864 and 1900. J. Kostecki, "Czytelnictwo czasopism w Królestwie Polskim w II połowie XIX wieku", in: *Problemy literatury polskiej okresu pozytywizmu*, ed. E. Jankowski, J. Kulczycka-Saloni, Zakład Narodowy im. Ossolińskich, Wrocław 1984, p. 278.

activity was Warsaw, the third-largest city in the Russian empire at the end of the 19<sup>th</sup> century. In Galicia, which belonged to Austria, there was a revival of publishing activity after the introduction of autonomy in the 1860s. The region remained economically weak, but increasing cultural autonomy sparked the development of Polish language education and Polish scientific and cultural initiatives. This and the liberalisation of censorship had a positive influence on publishing activity, especially in Lvov, Galicia's administrative capital. In the Prussian partition, publishing activity developed less dynamically due to the economically weak position of Poznań and the policy of Germanisation.<sup>9</sup>

#### COPYRIGHT PROTECTION ACROSS BORDERS

The legal aspect of the Polish publishing market was rather complex. Although all three partitioning powers had already introduced copyright laws in the first half of the 19<sup>th</sup> century (Russia in 1828, Prussia in 1837, and Austria in 1846), these were only partially effective in the Polish territories. Until 1870, the Russian law was not in force in the Congress Kingdom (Kingdom of Poland), founded after the Congress of Vienna in 1815. This was because the Kingdom of Poland had not adopted the Russian Empire's civil code, but the Napoleonic Code, which had been previously introduced in the Duchy of Warsaw by Napoleon in 1807. In 1825, the Napoleonic Code was also introduced with minor changes in the Congress Kingdom. However, the Napoleonic Code adopted in the Polish territories did not include the law on literary property introduced in 1793 in France. The legal situation in the Congress Kingdom was made even more complicated by the fact that the Russian criminal code from 1845, which came into force in the Kingdom in 1847, contained clauses stipulating fines for the violation of literary property, but there was no definition of literary property in

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9 A. Jazdon, *Wydawcy poznańscy 1815–1914: kształtowanie środowiska i repertuaru wydawniczego*, Wydawnictwo Naukowe Uniwersytetu im. Adama Mickiewicza, Poznań 2012, p. 378.

civil law. In 1861, Russia signed an agreement on the mutual protection of copyright with France, and a year later, it signed a similar agreement with Belgium. Both treaties were also in effect in the Kingdom of Poland. In 1867, in one of the first Polish texts on the topic, Seweryn Markiewicz joked that “in the countries which have signed agreements with the Empire the interests of our [Polish] writers and publishers enjoy the protection of the law and the courts which they do not enjoy in their own country. Therefore, the position of an inhabitant of the Kingdom of Poland is more favorable in France and in Belgium than in his own country”.<sup>10</sup>

Despite such theoretically unfavourable regulations, publishers from the Kingdom of Poland neither complained about reprints nor did they demand changes. They were quite efficient at self-regulating the publication and sale of books amongst themselves, relying on customary trade practices, while at the same time translating French literary production to Polish, as the treaties with France and Belgium did not protect translations. Russia did not take part in the negotiations of international copyright and did not sign the Berne Convention. The bilateral agreements with France and Belgium signed in the early 1860s were never renewed, and thus reprints and translations by foreign authors were not prohibited in the Russian Empire, just as works by subjects of the Czar were not protected from unauthorised translations abroad.

In the Duchy of Poznan, another state created by the Congress of Vienna, the Prussian Intellectual Property Protection Act from 1837 came into force after 1848 when the Duchy lost its legal autonomy and came under direct administration of the Prussian state.<sup>11</sup> Simultaneously, the publishing law introduced in Prussia in the late 18<sup>th</sup> century was put into force.<sup>12</sup>

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<sup>10</sup> S. Markiewicz, “Prawa autorskie, czyli tak nazwana własność literacka i artystyczna w Królestwie Polskim i zagranicą”, *Ekonomista* 1867, no. 3, p. 152.

<sup>11</sup> Gesetz zum Schutze des Eigenthums an Werken der Wissenschaft und Kunst gegen Nachdruck und Nachbildung.

<sup>12</sup> Allgemeines Landrecht (ALR) of 1794: I. 11 §§ 996–1036 ALR, I20 §§ 1294–1297.

The latter was more important for Polish publishers not only in the Prussian partition but also in the others because it was the basis of the customary law observed by all Polish publishers across the different legal systems. There was no mutual protection between the Polish partitions belonging to Russia, Austria, and Prussia. Russia had no bilateral agreements with either any of the German states or with Austria, while the agreement on mutual protection between Prussia and Austria was only effective in their territories belonging to the German confederation. Since neither Galicia nor Poznan belonged to the German confederation, there was also no mutual protection between Austria's and Prussia's Polish territories. Yet reprints circulating between those territories were not much of a problem, and although joining the Berne Convention might have seemed attractive to publishers supplying a market divided by the borders of the partitioning states and subject to three different copyright laws, they mostly opposed it. They saw the freedom to publish translations of foreign works as more important than the protection against reprints.

#### **FOREIGN TRANSLATIONS AND THE FIRST POLISH LITERARY PROPERTY LAWSUIT**

The importance of foreign translations to the Polish publishing market can be illustrated by the first Polish literary property lawsuit. In 1866, *Gazeta Polska*, a Warsaw newspaper, took *Kłosy*, another Warsaw newspaper, to court over the right to publish a Polish translation of Victor Hugo's novel *Toilers of the Sea*. Both papers had planned the publication of their translations at the same time. *Kłosy*, however, was the first to announce that it would publish *Toilers of the Sea* in its free supplement. The next day, *Gazeta Polska* demanded *Kłosy* to stop the project, showing a document according to which it had purchased the exclusive right to translate and print Hugo's novel in Polish.<sup>13</sup> As mentioned earlier, foreign

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13 The contract of purchase had been signed only a few days before *Kłosy*'s announcement.

translations were not protected in the Kingdom of Poland, similar to the Russian Empire. To gain earlier access to new novels by Victor Hugo, who was exceptionally popular in Poland, the editors of *Gazeta Polska* had paid Hugo's foreign publishers for the manuscript. But even though *Gazeta Polska* had bought the manuscript early, it could not immediately start printing the translation because when Hugo's new novel came out in French, bookstores it was busy printing Dickens's *Our Mutual Friend* and needed to complete the title first.<sup>14</sup>

*Kłosy* proposed to reimburse *Gazeta Polska* for the purchase of the rights, saying they could not pull back because they had already announced the publication of the novel as a bonus to their subscribers. However, *Gazeta Polska* did not accept the proposal and brought a lawsuit against *Kłosy*. From a legal perspective, there was a precedent. At the time, Polish newspapers published translations of foreign novels in instalments without asking the authors of the original works for permission. The court ruled that translating and publishing texts by foreign authors without their permission was not illegal.<sup>15</sup> At the time of the lawsuit, the protection of translations appeared as one of the issues in the ongoing discussions about international copyright in Europe. Both sides could thus easily find arguments in contemporary foreign publications, especially French ones.<sup>16</sup> *Gazeta Polska*'s lawyers based their claim

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14 Because the transaction did not have any legal foundation, the price was not high. It was 600 French francs.

15 First, *Gazeta Polska* filed a suit in the Court of Commerce, which ruled in favour of its claim and prohibited *Kłosy* from publishing *Toilers of the Sea*. But then *Kłosy* filed an appeal and the Court of Appeal overturned the decision, ruling against *Gazeta Polska*'s claim in favour of *Kłosy*. The Supreme Court upheld this decision. The decision was based mainly on the convention with France from 1861 and on the fact that the convention did not protect translations.

16 For discussions about international copyright in Europe, see C. Haynes, *Lost Illusions the Politics of Publishing in Nineteenth-Century France*, Harvard University Press, Cambridge, Mass-London 2010; C. Seville, *The Internationalisation of Copyright Law: Books, Buccaneers and the Black Flag in the Nineteenth Century*, Cambridge University Press, Cambridge-New York 2006; S. Ricketson, J. C. Ginsburg, *International Copyright and Neighbouring Rights: The Berne Convention and Beyond*, Oxford University Press, Oxford-New York 2006.

on the concept of literary property as natural law.<sup>17</sup> *Kłosy* did not deny that authors had a right to the recognition of their achievements and earnings but argued that literary property was not the same thing as property in general.<sup>18</sup> To demonstrate the different character of literary property, *Kłosy*'s lawyers showed that in many countries, literary property was governed by special acts of law and that the terms of authors' rights varied from country to country. They pointed out that only a few countries had signed agreements on the protection of translations so far and that they were only those countries that had an interest in the mutual protection of translations, like France and Britain.<sup>19</sup>

One of the main reasons given for the judgment was the need to guarantee access to world literature and knowledge to the inhabitants of the Kingdom of Poland.<sup>20</sup> The court was not convinced by

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- 17 They claimed that the exclusive right to the translation of Hugo's novel, which *Gazeta Polska* bought from the French publisher, was now its property, just as any other thing becomes the buyer's property when he has bought it. They also argued that this property deserved special protection because it was the expression of a great writer's spirit and genius. According to *Gazeta Polska*'s lawyers, the recognition of literary property was an expression of morality, of the rule of law between civilised nations, and of supreme truth. These arguments could also be found in the rhetoric of Western European publishers supporting literary property and treating it as natural and universal law and as a standard for civilised nations. Haynes, *Lost Illusions the Politics of Publishing in Nineteenth-Century France*, pp. 50, 71-71, 195, 203; Sevle, *The Internationalisation of Copyright Law*, pp. 53, 254.
  - 18 Literary property could not be the exclusive property of an individual because its creators took inspiration from stocks of common goods like nature, culture, or human thinking, which could not be taken into possession and could not be restricted. This kind of argumentation appeared earlier in P. Proudhon, *Les Majorats littéraires*, Alph. Lebègue, Brussels 1862.
  - 19 Russia, in its convention with France from 1861, had only agreed to protect reprints and reproductions but not translations. The Russian-French convention was also effective in the Kingdom of Poland. Therefore, *Kłosy*'s lawyers argued that translations were not protected in the Kingdom. They also pointed out that one of the reasons why the freedom of translations from foreign literature had never been questioned in the Kingdom of Poland was the need to develop education and science.
  - 20 The court cited an opinion given by the Warsaw District Office for Science in 1858 regarding the convention with France which was being negotiated at the time. The District Office for Science was responsible for education policy in the Kingdom. It wrote that protecting translations would bring advantages only to France. It would bring only disadvantages to the development of science in the Kingdom.

*Gazeta Polska*'s argument of literary property as natural law. That concept, borrowed from France with its powerful publishers' lobby, did not suit the interests of the inhabitants of the Kingdom of Poland at the time, just as it did not suit the interests of the other inhabitants of the Russian Empire, where access to education, science, and literature was much more difficult than in Western Europe.

#### POLISH DISCUSSIONS ON LITERARY PROPERTY AND UNIVERSAL AUTHORS' RIGHTS

With the exception of the lawsuit described above, we find little information about lawsuits concerning the violation of authors' rights in the Polish territories in the 19<sup>th</sup> century. Those lawsuits were quickly resolved and did not have major consequences for the book trade.<sup>21</sup> Reprints were limited by the self-regulation of the publishing trade. One of the regulating mechanisms was the organisational structure of the Polish publishing market, where publishers usually were also booksellers interconnected through a network of trade contacts. The threat of exclusion from this network was an important disciplinary tool.<sup>22</sup> Publishers were also afraid of moral condemnation in the press and being accused of harming the Polish printed word.<sup>23</sup>

Conflicts, including copyright violations, were also settled out of court. Information about this can be found in the correspondence of authors of the era. For example, Ignacy Maciejowski, a writer living in Galicia, described to his friend Maryla Wolska how his wife was able to get compensation for unsolicited use of his work from a publisher and owner of a printshop in Warsaw, thanks to the intervention of a representative of the Warsaw literary soci-

21 For example, see *Obrona własności literackiej księgarń Gubrynowicz & Schmidt*, Gubrynowicz & Schmidt, Lwów 1880; "Echa Warszawskie", *Przegląd Tygodniowy* 1872, no. 48, p. 378.

22 "W obronie własności literackiej", *Kurier Poznański* 1907, no. 3, p. 2.

23 "Prawo autorskie", *Tydzień Literacki, Artystyczny, Naukowy, i Społeczny* 1878, no. 48, p. 23.

ety. He had been informed about the reprint by another Warsaw publisher.<sup>24</sup>

In 19<sup>th</sup>-century discussions in Poland, like elsewhere in Europe, nobody really questioned authors' rights to their works throughout their entire lives. There were different opinions about how to handle the rights to a work after the author's death and to whom these rights should belong. The majority of authors who wrote about the topic supported a temporal limitation of copyright. Proudhon's pamphlet *Les Majorats littéraires*,<sup>25</sup> which criticised the concept of eternal protection of literary property, received very positive reviews in the Polish press, and many Polish texts on the topic called upon the arguments of the French philosopher.<sup>26</sup> During the discussion sparked by the demands of the Brussels congress in 1858, the Warsaw writer and publisher Franciszek Salezy Dmochowski argued, like some French authors, that after an author's death, his heirs should inherit unlimited financial rights but only limited rights controlling the publication of his works.<sup>27</sup> If a book was not available for the reading public, publishing rights would pass into the hands of a specially convened government commission, and the author's heirs would receive a certain part of the proceeds of the publication. According to Dmochowski, such a solution would be better than a limited but long protection period because, as he expressed it,

whether we awarded an eternal property right or whether we turned it into a privilege for a limited number of years, from 20 to 50 like it is currently practiced, we would not avoid a severe damage to public

24 "Korespondencja Ignacego Maciejowskiego (Sewera) z Mieczysławem Pawlikowskim (1870–1892)", in: *Miscelanea literackie 1864–1910*, ed. S. Pigoń, Zakład Imienia Ossolińskich, Wrocław 1957, pp. 46–407.

25 Proudhon, *Les Majorats littéraires*.

26 "Przegląd literatury zagranicznej", *Gazeta Warszawska* 1862, no. 199; "Proudhona Majoraty literackie", *Gazeta Polska* 1862, no. 124, p. 2; W. Spasowicz, *Prawa autorskie i konterefakcya*, Biblioteka Umiejętności Prawnych, Warszawa 1874, p. 20.

27 F. S. Dmochowski, "O własności literackiej i artystycznej", *Biblioteka Warszawska* 1860, no. 4, pp. 576–599. See also G. de Champagnac, *Etude sur la propriété littéraire et artistique précédée d'une lettre de M. le vicomte A. de La Guéronnière*, E. Dentu, Paris 1860.

education if a work for all those years was withdrawn from the sale of books and hence could not serve for public use.<sup>28</sup>

Markiewicz, the author of the previously mentioned essay on copyright, was a staunch supporter of a limited protection period but held that its length should be determined by “the representatives of authors’ and book sellers’ interests themselves” with a greater “guarantee of knowing the subject” than him.<sup>29</sup> When Włodzimierz Spasowicz, a Polish lawyer and writer living in Petersburg, weighed up different positions and analysed the law effective at the time, he advocated shortening the period effective in Russia to 25 years after the author’s death, that is to the period which had been introduced in the first Russian act from 1828. He argued that the extension of the protection period to 50 years after the author’s death introduced in 1857 had led to a situation in which no good, cheap edition of Pushkin’s works was available in Russia in the 1860s.<sup>30</sup> He was also worried by the speed at which the protection period was extended in some countries. Looking at the changes in French law in the 19<sup>th</sup> century, he wrote:

If this development continues at the current speed and scope one could conclude that in the 20<sup>th</sup> century it will reach its Columns of Hercules, that is that copyright will be eternal in time and encompassing the whole world in space; that for example, should my book not be completely outdated and unfit for reading, only my descendants will be able to draw a gain from it and nobody will dare to reprint it, not even on the Sandwich Islands, even though neither I nor my descendants will be able to deliver this product to the denizens of the other half of the globe.<sup>31</sup>

An even more radical position on the protection period was held in an unsigned editorial piece in the journal *Tydzień* in Lvov.

Let us only remark that the number of years introduced on behalf of the heirs, 50 years in France and 30 years in Germany, is too big,

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28 Ibidem, p. 588.

29 Markiewicz, *Prawa autorskie...*, p. 186.

30 Spasowicz, *Prawa autorskie i konterefakcja*, p. 110.

31 Ibidem, p. 92.

and if we have to leave anything to the heirs it would be absolutely enough to leave them the right to a one-time edition within a period of no more than 10 years after the author's death, and if they did not make use of it they would lose it to society which would give everyone the freedom to make ever cheaper editions under the pressure of competition.<sup>32</sup>

However, positions like this were fighting a losing battle against the development of legislation in the era. The Berne Convention, passed in 1886, set the standard protection of copyright to 50 years after the author's death.

#### THE ISSUE OF THE RIGHT TO TRANSLATIONS

While opinions about the theoretical concept of literary property Polish writers, publishers and lawyers held different they generally agreed with regard to the protection of translations. Most of them decidedly supported the freedom to translate foreign authors. As the lawyer representing *Kłosy* against *Gazeta Polska* said:

In our country the possibility of making translations in the widest sense has not been put into question by anyone so far. Ever since the most ancient times up to this very day everyone could make translations from foreign languages without asking anyone's permission, because in our country this is a question related to the question of education and its promotion. The greater part of historical, economical, legal, philosophical, medical, mathematical and works of all special sciences have been translated from foreign languages, and the same is taking place in lighter literature like the arts of theater, novels and romances.<sup>33</sup>

Lawyer and writer Włodzimierz Spasowicz argued that

a translation, which costs much time and independent work of the translator, can rather be considered a rewriting than a reproduction of the original: it appears in circulation at a time when the original

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32 *Prawo autorskie*, p. 23.

33 "Proces redakcyi Gazety Polskiej z redakcją i wydawcą czasopisma *Kłosy*", *Kłosy. Dodatek nadzwyczajny* 1867, no. 87, p. 6.

has already been widely distributed and enjoyed success, it does not therefore substantially damage the sales of the original work. In any case, the complete freedom of translations considerably contributes to the quick exchange of thought and the development of science and education between nations. For some literatures, especially those which produce few original works, the permission of translations is a vital question on which their existence and development largely depends. For example, what would today's Russian literature be if one were to exclude from it the enormous number of translations whose production incessantly occupies hundreds of hands and even entire literary societies?<sup>34</sup>

Translation rights were also discussed in the Polish press on the occasion of the 1879 literary congress in London.<sup>35</sup> At the congress, the demand was made that the right to translations belonged exclusively to the author and for the same period as the protection against reprints. *Gazeta Polska* presented the participation of Polish writers at the congress as an occasion for Polish literature to join the family of "European literatures". At the same time, it pointed out that the road to joining might involve recognising literary property and accepting the right to translations. The author of the text argued that it would be worth paying the price for the right to translations in exchange for the international recognition of Polish literature, whatever publishers might say against it.<sup>36</sup> However, this view was not shared by the editors of the opinion-making Warsaw weekly *Przegląd Tygodniowy*, who criticised Polish delegates for silently agreeing to solutions that were to the detriment of Polish literature and firmly announced that it would continue to stick to prevailing law and adapt foreign literature to the Polish language for free. The article accused Polish delegates of not having a man-

34 Spasowicz, *Prawa autorskie i konterefakcja*, pp. 61–62.

35 *Gazeta Polska* wrote about the London congress in its numbers 137 and 138 under the heading "Korespondencje Gazety Polskiej". One of the participants of the congress was Waclaw Szymanowski, an editor of *Kurier Warszawski*, in which he published daily reports. W. Szymanowski, "Z Londynu", *Kurier Warszawski* 1879, no. 131.

36 "Z literatury i sztuki", *Gazeta Polska* 1879, no. 173.

date to accede to the congress's demands in the name of all concerned, especially since these demands were to the detriment of Poland, which did not have the means to buy translation rights.<sup>37</sup>

The *Tydzień* editorial quoted earlier took a similar stance on the subject. The editors expressed the opinion that the protection of foreign translations was not necessary and did not provide the authors themselves with any advantage because they usually sold off all rights to the publishers, including the right to translations. They emphasised that translations fulfilled an important function of "familiarizing readers with the most outstanding works of foreign literature".<sup>38</sup> At the same time, the editorial made it clear that *Tydzień* did not support the translation of low-value foreign novels appearing in instalments in journals that had been founded specially for that purpose. On the other hand, as critic Antoni Sygetyński observed in 1884, only a very small proportion of foreign translations were scientific works:

The publishers who would permit themselves to bore their readers with translations or summaries of the positive results of scientific studies are few. Most hide behind the hypocrisy of resisting harmful Western influences [...] In compensation they are so freethinking and tolerant when it comes to pillaging fiction, to numbing the minds of their readers with the most diverse ideas or tendencies – as long as their form is artistic and easy to digest, like a novel, a play or a comedy.<sup>39</sup>

Sygetyński claimed that unlimited freedom to translate foreign authors harmed Polish literature flooded by cheap translations. He wrote that Polish authors were already pillaging the stock of Western fiction not only with full hands but by the wagonload.<sup>40</sup> Such opinion was not, however, generally shared.

The right to translations was also relevant for those Polish authors who were beginning to enjoy international fame in the last

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37 *Przegląd Tygodniowy* 1879, no. 34.

38 *Prawo autorskie*, p. 24.

39 A. Sygetyński, "Nasz ruch powieściowy", *Wędrowiec* 1884, no. 38, p. 454.

40 *Ibidem*, p. 453.

decades of the 19<sup>th</sup> century and who were translated into foreign languages. Some of them wrote in private letters that they would have welcomed any additional income from foreign translations, but none of them openly demanded the international protection of translations, and some even publicly opposed it.

Bolesław Prus, one of the greatest realist Polish writers, openly made fun in the press of the French Literary Society's attempts to prohibit unsolicited translations of French authors in the Russian empire. In 1881, Petersburg bookseller P. Michelet announced to the press that the French Literary Society had authorised him to take to court any translations from French done without a permit from that Society. Prus joked that this way, the French were doing the Polish a favour because

if we cannot translate French authors for free then we will have to turn to Italian, Spanish, German, and best of all, to English authors - and we will win! ... Your genuinely brilliant author will surely not enrich himself at the cost of a poor nation. And if he likes to demand a road toll, ha! ... Then we will ask him to take his fee out of those sums which France herself granted us after the Napoleonic Wars.<sup>41</sup>

Józef Kraszewski, a Polish writer living in exile in Dresden, was elected one of the vice-chairmen of the 1881 literary congress in Vienna. Although he lived outside of Poland, he was the best-known and most widely published Polish author of the time, an unquestioned literary and political authority. In his address to the congress, he said, "I am honored to belong to a nation which, because of its language, has very little to gain from the recognition of literary property. As a Pole I have no interest in the matter, but as a man and a Pole I am taking part in efforts which bring us closer to each other and serve the goal of unity and justice".<sup>42</sup>

For Poles struggling to develop and strengthen the publishing market in their national language, the importance of free trans-

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41 B. Prus, "Wyprawa francuskich literatów na polskich Krumirów – tłumaczy", *Kurier Warszawski* 1881, no. 113.

42 *Kurier Warszawski* 1881, no. 213.

lations was obvious. Translations of foreign works made up one-third of fiction published in Warsaw, the most important Polish publishing centre. Although slogans put forward by the supporters of the Berne Convention referring to universal author's rights and civilisational standards rang true to the ears of some Polish writers and lawyers, public opinion leaned towards the view that the protection of translations would harm the development of Polish culture. This conviction was tacitly or openly shared by many authors who were often also editors of periodicals making use of foreign works. The development of the press created jobs for editors and translators and perspectives for authors writing in Polish, for whom the press was their main source of income. Before Henryk Sienkiewicz became one of the most widely translated Polish novelists, he was head of the literary section of the newspaper *Slowo*, and his responsibilities included choosing foreign novels for the literary pages.<sup>43</sup>

#### TO JOIN OR NOT TO JOIN THE BERNE CONVENTION?

Independent decisions about joining international treaties were impossible in the Polish territories - even in Galicia, which enjoyed some political autonomy. They were bound by the decisions of the partitioning powers. In the Prussian partition, Polish publishers were subject to the Berne Convention from the start,<sup>44</sup> while publishers operating in Russia and Austria remained outside the Berne Convention until independent Poland joined it in 1920. Germany had a high output of cultural and scientific literary production, while Austria-Hungary and Russia were on the receiving end of foreign literature and science, which were translated without permission. Both states were multicultural and multilingual empires encompassing various local and national publishing markets, whose development depended on foreign translations. According to Sibylle Gerhard, the main reason why Austria-Hun-

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43 Sienkiewicz's sister Helena was one of the translators working for the *Slowo*.

44 Germany was one of the initial signatory states of the Berne Convention.

gary remained outside of the Berne Convention was the widely differing opinions on the subject in the multinational empire. Opponents of the convention included Poles and other Slavic nationalities, while German-language authors and publishers demanded joining the convention because they found that remaining on the outside was against their own interests.<sup>45</sup> The latter brought forth not only economic arguments, complaining about material losses caused by the lack of international protection, but also called upon morality and reputation. They argued that remaining outside of the convention would exclude Austria from the circle of civilised countries and that piracy would hurt its reputation abroad.<sup>46</sup>

Meanwhile, the opponents of joining the Berne Convention claimed that it would inhibit local education and science. To them, freedom of translation was a necessary condition for the progress of education and access to culture. The Austrian government sided with these arguments because they were in line with the historical tradition of enlightenment promoted by Maria Teresa and Joseph II<sup>47</sup> and fit in well with the Austrian government's self-promoted image as a mediator of the interests of all lands and nations in the empire.

Faced with repeated petitions and questions from authors and publishers regarding joining the Berne Convention, in late 1899, the Austrian ministry of justice sent out a questionnaire to institutions potentially interested in the matter. It was distributed to academies, universities, authors' and artists' associations, as well as publishers in Vienna, Prague, Cracow, and Lvov. The questionnaire included questions like: "Is joining the convention in the interest of authors and creators, will it be profitable from the per-

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45 Austria only joined the Convention in 1920 after the dissolution of Austria-Hungary.

46 Gerhard, *Vogelfrei*, p. 231.

47 Maria Teresa and Joseph II supported reprints in Austria as part of their politics of Enlightenment in the second half of the 18<sup>th</sup> century. They also condoned the activities of Johann Thomas Trattner, a publisher from Vienna and the biggest book pirate of the German language area, who supplied classical works of German Enlightenment to readers not only in Austria but in all of Central and Eastern Europe. U. Giese, "Johann Thomas Edler von Trattner. Seine Bedeutung als Buchdrucker, Buchhändler und Herausgeber", in: *Archiv für Geschichte des Buchwesens, Buchhändler-Vereinigung*, Frankfurt am Main 1960, vol. XXIII, pp. 2153–2366.

spective of publishers, and what will be the results for the public?" Or, "Will it further or weaken the cultural needs of the empire's denizens?" Responses revealed considerable differences in interests. One-third of the respondents were against joining the Convention; another third was for joining but maintaining current Austrian law, which permitted unsolicited translations, while the last third was for joining the Convention under the conditions already established by the Convention.<sup>48</sup> Outspoken opponents of joining the Convention included Polish institutions and associations from Lvov and Cracow, which were also supported by Polish members of the parliament in Vienna.<sup>49</sup>

The discussion about the questions posed in the questionnaire also took place in the Polish press. Cracow weekly *Czas* wrote that the only question that should decide about joining the Convention was whether it was harmful or not for the interests of the empire, that is, whether it would have a "vitalizing influence on the literary and artistic activity in the country".<sup>50</sup> The editors of *Czas* published the most important points of an expertise prepared by lawyers Fryderyk Zoll and Stanisław Wróblewski, which was ordered by the Cracow-based scientific society Academy of Skills. Zoll and Wróblewski argued that Polish authors would not profit from joining the Berne Convention because their works were not often translated abroad and that those that were, e.g., by Henryk Sienkiewicz, were mainly published in countries with which Austria already had bilateral agreements. On the other hand, publishers would suffer significant losses, as would Polish language readers at large. The protection of translations would lead to the rise of theatre ticket prices and negatively influence the working conditions of actors. Publishers, especially of newspapers and journals, would publish "translations of the cheapest things, that is, of less value". The authors argued that Polish literary production was not

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48 Gerhard, *Vogelfrei*, p. 240.

49 Ibidem, p. 243.

50 "Przystąpienie Austrii do Konwencji Berneńskiej", *Czas* 1900, no. 120, p. 122.

sufficient to satisfy the needs of the Polish public and that a limitation to Polish production would also lead to the “severance of intellectual ties with Western civilization”.<sup>51</sup> Joining the Convention would not only weaken publishing activity in Galicia but also make an exchange with the Kingdom of Poland more difficult.

Not all Poles in Galicia were so unequivocally against the Convention. Michał Rostworowski, also writing in *Czas*, criticised the stance taken so far by Austria. He accused Austria of passivity towards the negotiations and also of selfishness, ordinary calculation of interests, and ignorance towards the principles of civilisational progress in establishing universal law.<sup>52</sup> Rostworowski, who studied law in Petersburg, Paris, Berne, and Vienna, specialised in international law and was evidently less interested in locally defined interests of Polish publishers and audiences.

Poles living in territories under the authority of the Russian administration had little political and cultural autonomy after the lost insurrection of 1863–1864 and little influence on Russian foreign policy. In press discussions referring to international literary congresses preceding the conclusion of the Berne Convention, most authors openly opposed the protection of translations, while some of them, especially those who took part in international literary congresses, were concerned about the place of Polish literature on the international literary scene. They suggested that if Poles supported international literary property regulations, this would place them on the side of progress and civilisation. On the other hand, such declarations had a rather symbolic meaning because they did not have any considerable influence on the policies officially pursued by Russia. Spasowicz, who was a Polish man of letters but, at the same time, also a well-known and respected lawyer in Petersburg, thought that internationalisation of copyright was an inevitable process and that it was only a question of time

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51 Ibidem.

52 M. Rostworowski, “Kilka uwag w kwestii przystąpienia Austrii do Konwencji Berneńskiej”, *Czas* 1900, no. 135–136.

until Russia would join the Berne Convention. Yet, he was still convinced that a strong and long-term protection of copyright was generally bad for literature. He spoke out in favour of compensating foreign authors for translations of their works but suggested that such regulations should be introduced gradually and protection periods should be short.<sup>53</sup>

### CONCLUSIONS

While remaining under three diverse administrative orders and separated by state borders, Poland formed a unified linguistic publishing area, with a successful exchange of publishing and literary production despite the customs and censorship difficulties. The rights of authors were predominantly respected, and reprints of works published in a different partition were rare, even though they were not formally forbidden.

The Polish publishers were generally not supporters of an eternal protection of literary property and did not call for longer protection. If the issue of the length of authors' rights was broached at all in relevant Polish discussions, it was to call for its limitation. That position was in line with the economic and structural conditions of the Polish publishing movement. Although it had grown dynamically in the last three decades of the 19<sup>th</sup> century, publishers did not have much capital at their disposal and were very cautious regarding the publication of books. They did not hoard authors' rights either but usually bought the rights to individual editions.<sup>54</sup>

The most contested question was the protection of translations. While the lack of relevant regulations was considered a serious problem, especially in reference to the author's moral rights and sometimes led to disputes between publishers, the introduction of

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53 W. Spasowicz, "Rzecz o tak zwanej własności literackiej", in: *Pisma, Księgarnia Br Rymowicz*, Petersburg 1892, vol. 4, p. 106.

54 The late 19<sup>th</sup> century, cheap editions of the most popular novelists with a run of 10,000 to 25,000 copies were published on the initiative of philanthropic bankers who waived profit. The price of the books covered production costs and authors' royalties were higher than those normally offered by publishers.

the full protection of translations was seen as an unfavourable solution. For some authors, especially those invited to international literary congresses, the question of the protection of translations was inconvenient. On the one hand, international literary societies whose members included world-famous writers, such as Victor Hugo, promoted universal copyright as a civilisational standard and appealed to writers' solidarity, calling on them to join the struggle for international protection. On the other hand, the protection of translations was criticised by public opinion and regarded as harmful for Polish culture, science, and education. Unauthorised translations would not only strengthen the economically weak Polish press and publishing market but would also give readers almost immediate access to popular and *avant-garde* world literature and the latest scientific developments.

#### SUMMARY

The article deals with the Polish discussion of literary property and copyright in the second half of the 19<sup>th</sup> century. Because of the partitions, Polish publishers in that era were subject to different legal systems (Russian, Prussian, and Austrian) while the Polish language publishing market was divided by customs borders. On the other hand, there was a flourishing cooperation between Polish publishers based on unwritten customary publishing practices that were observed across borders. In contrast to countries with more developed and concentrated publishing markets, there were no significant differences in the views of Polish publishers on literary property or the duration of copyright protection. In the international debate on the protection of translations, Polish publishers, lawyers, and also writers usually opposed the full protection of translations because they saw it as a threat to the development of Polish culture, which depended on access to world literature and science.

**KEYWORDS:** Copyright history, literary property, publishing history, Berne Convention, Polish culture, 19<sup>th</sup> century



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# MUSIC IN WARSAW ON GALA DAYS OF 1815–1850

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The aim of this text is to discuss the musical repertoire performed in Warsaw during public court holidays – the so-called “gala days” [Polish: *dni galowe*] – in 1815–1850. Music, due to its functions and emotions it evoked, was a special, distinctive element of these celebrations. This topic has not been addressed in the academic studies thus far, although descriptions of individual ceremonies and music pieces can be found.

The basic source material is information collected from the then Warsaw dailies and other periodicals. They were compared with the relevant bibliographies, dictionaries, chronicles, and catalogues, as well as the widely understood studies on the subject.<sup>1</sup> In order to establish the basic facts, the Warsaw calendars were also used, which have become more and more widely available to researchers as a result of extensive digitization of library collections.<sup>2</sup> Counted among the serial publications, they constitute

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1 These sources are mentioned in the following footnotes.

2 A particular difficulty is the dispersion of digitised calendars on various Internet platforms and, consequently, different rules for their description. This makes it challenging to identify individual titles, as the same calendars from collections of different libraries often differ in the description principles adopted, including the date of publication. In the descriptions of the calendars, included in the footnotes to the present text, I have adopted as the date of issue the date of the previous

a category of printed sources that is unique. As for the music in particular, they do not contribute much. However, due to the fact that they were present in almost every house of a Warsaw resident, they shaped people's awareness of the chronology of gala days and other important holidays.<sup>3</sup>

The main task of the present work is to describe the music performed on ceremonial days during services, theatre performances, and at occasional balls, as the given celebration was extended for the entire day. It began with the morning greetings to the Grand Duke Konstantin and morning services in the Roman Catholic and Greek Catholic churches, followed by a Christmas dinner, and in the evening, there was a theatre and a ball. There was also a performance on the eve of the actual holiday, and the occasional ball often ended on the morning of the next day. Moreover, various groups organized accompanying events related to the celebration. As far as possible, I also take into account the mention of music during military parades and during occasional dinners. I am also interested in all the court rituals and organisations accompanying these ceremonies. They are consistent with the rules and spirit of the era, as well as with the political reality, constituting an important part of the history in which Warsaw found itself after the partitions.<sup>4</sup>

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year (I give it in square brackets) rather than the date on the title page. Calendars for the following year were usually prepared at the end of the previous year.

"I have already started composing the 'Information and pocket calendar for the year 1849' [...] A. Rousseau", *Kurier Warszawski* 26 July 1848, no. 196, p. 958.

- 3 "[...] Every more important saint, every more trusted patron, every name-day or birthday of friends, he has a red column underlined in his calendar, and the calendar hangs on a nail by the window [...]", *Szkice i obrazki. Dzieło illustrowane 48 rycinami [...] przez F. Kostrzewskiego [...]*, Warszawa 1858, p. 2.
- 4 Warsaw, as a result of the arrangements of the international conference in Vienna (September 1814–9 June 1815), became the capital of the Kingdom of Poland created at that time – in a personal union with Russia. Its ruler was Alexander I – the first Polish king of the Romanov dynasty. Earlier (1795), after the Third Partition of Poland, the country lost its independence, and Warsaw was first the capital of South Prussia (1796–1806), and then – under Napoleon's rule – of the Duchy of Warsaw (1806–1815). With time, the disagreement with the Russian rule led to an uprising in November 1830, which ended in failure. Its fall resulted in the loss of the independence of the Kingdom of Poland, and its lands – including Warsaw – were subject to martial law on 26 June 1833, which lasted until 1856.

Following the custom of the court of the Russian Empire, after the establishment of the Kingdom of Poland, festive days were designated in the printed Warsaw calendars, initially known as “the ceremonial days in the Russian Empire” [*dniami uroczystymi w Imperium Rossyiskiem*.<sup>5</sup> Then, in the title of the calendars, the name was changed to “gala days in the Russian Empire” [*dni galowe w Imperium Rossyyskiem*], while the previous name of the calendar column was preserved.<sup>6</sup> This dualism functioned during the first years of the Kingdom of Poland, and finally, the term “gala days in the Russian Empire [alternately in Russia] and the Kingdom of Poland”<sup>7</sup> [*dni galowe w Imperium Rosyjskim / Rosji / cesarstwie rosyjskim i w Królestwie Polskim*] was adopted and, with time, after the November Uprising – “gala days”.<sup>8</sup>

The custom of celebrating gala days, on the one hand, referred to the time of the First Polish Republic, when anniversaries of elections, coronations, and royal births were considered holidays. On the other hand – in its real dimension – it referred to the Russian imperial tradition. At that time, holidays were associated with the birthdays and name-days of successive Romanov emperors and their families. A distinction was made between the “commemoration of the accession to the throne” of Alexander I (12 March) and his coronation (15 September), and similarly, the “anniversary of the accession to the throne” of Nicholas I (1 December) and the anniversary of his coronation (3 September).<sup>9</sup> Separate commemora-

5 *Kalendarzyk Mały Piański Polski i Ruski na rok 1815 [...]*, Warszawa [1814], unnumbered p. 7.; also: [1816], unnumbered p. 7.

6 *Kalendarzyk Kieszonkowy z odmianami powietrza Polski, Ruski i Żydowski zawierający święta dni galowych w Imperium Rosyjskim Na Rok 1816*, Warszawa [1815], p. 7.

7 *Kalendarzyk Kieszonkowy Polski, Ruski i Żydowski z odmianami powietrza zawierający święta dni galowych w Imper. Rossy. i Król. Polsk. na rok 1819 [...]*. Warszawa [1818], p. 7. *Nowy Kalendarzyk Polityczny na Rok 1819*, Warszawa [1818], p. 5.

8 *Kalendarz Polski, Ruski, Astronomiczny i Gospodarski Na Rok Państwski 1826 [...]. Z dodaniem dni Galowych w Cesarstwie Rosyjskim i Królestwie Polskiem [...]*, Warszawa [1825], p. 3. *Kalendarzyk Kieszonkowy Polski i Ruski z odmianami powietrza zawierający święta i dni galowe w Imperium Rosyjskim i Królestwie Polskiem Na Rok 1829*, Warszawa [1828], p. 5; A. Gałęzowskiego i Komp. *Kalendarz Domowy Na Rok Przestępny 1832*, Warszawa [1831], p. 9; *Kalendarzyk Kieszonkowy Na Rok 1840*, Warszawa [1839], p. 2.

9 *Kalendarzyk Mały Piański Polski i Ruski na rok przestępny 1816 [...]*, Warszawa [1815], pp. 15, 39. *Nowy Kalendarz Domowy na Rok Przestępny 1828 [...]*, Warszawa [1827],

tive days were devoted to the spouses of the emperors (Yelizaveta Alekseyevna and Alexandra Feodorovna), their mother (Maria Fedorovna), the third of the Romanov brothers (Grand Duke Konstantin Pavlovich), and other members of the imperial family. Ceremonies of granting Russian orders were also included: St Alexander Nevsky, St Anna, all imperial orders, and St Catherine. Notes in the press also mentioned the “ceremony of the military order of St. George, the one who grants victories”,<sup>10</sup> although it was only formally included in the catalogue of Warsaw holidays for the first time in 1830.<sup>11</sup>

The “ceremony of the Order of St. Stanislaus” of a long-standing tradition most likely appeared in the official catalogue of Warsaw holidays in 1819.<sup>12</sup> The order was established by King Stanislaus Augustus (Stanisław August) Poniatowski on 8 May 1765, awarding “24 orders to newly decorated members”.<sup>13</sup> Alexander I continued this tradition, and the order was still awarded, but a more extensive description of such a ceremony appeared in Warsaw dailies only in 1830.<sup>14</sup> The ceremony was later “resumed” in the church of St. Cross, and during the service, “[...] a large orchestra conducted by His Excellency Józef Stefani played a *Mass* composed by Haydn

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p. [4]. Alexander I ascended the Russian throne on 15 March 1801, and was crowned on 15 September. On the other hand, Nicholas I ascended the Russian throne on 1 December 1825, and he was crowned tsar of the Russian Empire on 3 September 1826. He was in power until 1855. By ascending the Russian throne, both of them obtained the title of Polish king “automatically”, by virtue of the established personal union. The subsequent Warsaw coronation of Nicholas I in 1829 was symbolic and its purpose was to win the sympathy of the Polish society.

- 10 *Kurier Warszawski* 1829, no. 329, p. 1475.
- 11 *Kalendarzyk Kieszonkowy Polski, Ruski i Żydowski Z odmianami powietrza, zawierający święta dni galowych w Rosji i Królestwie Polskiem na rok 1830 [...]*, Warszawa [1829], p. 49.
- 12 *Nowy Kalendarzyk Polityczny na Rok 1819*, Warszawa [1818], p. 13. *Kalendarzyk Kieszonkowy Polski, Ruski i Żydowski z odmianami powietrza, zawierający święta dni galowych w Imper. Rosyj. i Król. Polsk. na rok 1823 [...]*. Warszawa [1822], p. 23.
- 13 The ceremony was repeated until 1793 (*Kurier Warszawski* 1830, no. 123, p. 625).
- 14 *Dziennik Praw Królestwa Polskiego* 1816 vol. 1, pp. 144–151. The order, in line with the Russian tradition, was then divided into four classes: “Kawalerowie Orderu Sgo Stanisława. Podług listy podaney od Szpitala Dzieciątka Jezus [...]”, *Nowy Kalendarzyk Polityczny na Rok 1819*, Warszawa [1818], pp. 117–138.

and *Offertory* of the same His Excellency Stefani. Later *Tē Deum* of Rector Elsner [...] followed. There were all together 102 cavaliers [of this order]. People filled the entire spacious church".<sup>15</sup> Nicholas I continued the tradition of awarding the Order of St. Stanislaus, and after the November Uprising, it was included in the official catalogue of holidays of the Russian Empire.<sup>16</sup>

The combination of holidays changed over time, as they were adapted to the circumstances (the birthday of the great princess Olga Nikolayevna, the death of Alexander I and the enthronement of Nicholas I, the death of Empress Yelizaveta Alekseyevna, the birthday of the Grand Duke Konstantin Nikolayevich). In addition, the festive days overlapped with occasional holidays (the announcement of the constitutional law took place, for example, on the anniversary of Alexander I's birth), and the funeral celebrations of Alexander I and their anniversaries, the Warsaw coronation of Nicholas I, and the announcement of the heir to the throne, Grand Duke Alexander Nikolayevich (4 May 1834), took on the character of gala days.<sup>17</sup>

For Warsaw composers, as for the entire intellectual and artistic élite of Warsaw, the rebirth of the Kingdom of Poland was an extraordinary event. The appointment of the Polish Army, the Diet, and the freedoms guaranteed by the Constitution aroused feelings of gratitude to the emperor. The celebrations were, therefore,

15 *Kurier Warszawski* 1830, no. 124, p. 629.

16 "Kawalerowie polskich orderów [...]. Kawalerowie Orderu S. Stanisława [...]", *Rocznik Polityczny Polski*, Warszawa 1830, pp. 357–414.

17 The table below shows the scale of the phenomenon. It includes the number of ceremonies in the following months (m.) of selected years (Y).

Y./m. I II III IV V VI VII VIII IX X XI XII Together

1816 3 2 1 1 2 1 1 1 3 1 2 3 21

1829 2 3 1 - 4 2 3 4 3 2 1 2 27

1833 2 3 1 1 4 2 3 3 4 1 1 5 30

1849 2 3 1 2 1 1 5 5 4 2 1 5 33

*Kalendarzyk Kieszonkowy z odmianami powietrza Polski, Ruski i Żydowski zawierający święta dni galowych w Imperium Rosyjskim Na Rok 1816. Warsaw [1815]*, pp. 7–51; Year 1829. Warszawa [1828], pp. 5–49; A. Gałęzowskiego i Komp. *Kalendarz Domowy Na Rok Zwyczajny 1833 [...]*, Warszawa [1832], p. 9; *Kalendarzyk Informacyjno-Kieszonkowy Na Rok 1849. Przez Antoniego Rousseau*, Year 3, Warszawa [1848], pp. [21–22].

a special occasion to show and emphasize this feeling of gratitude through their own musical compositions. A type of musical piece frequently performed during gala performances, especially after 1831, was an occasional cantata - a multi-movement composition consisting of arias, recitatives, duets, choirs, and various types of group parts with the accompaniment of an orchestra. The expressive content and the external setting were connected with its function, which was based on panegyric texts, full of exaggerated admiration for the person to whom it was dedicated. On the other hand, orchestral dances, especially polonaises, specially composed for ceremonial days, became a kind of showpiece of balls.

Ceremonial services were held “in all the churches of the capital” (often the altar was also located in a tent in the courtyard of the Saski Palace),<sup>18</sup> in city synagogues, in military camps in the suburbs of Warsaw<sup>19</sup> (where galleries were arranged for ladies), in the “Ruthenian” chapel of the Royal Castle, and outside Warsaw in the churches of main regional cities. In Warsaw, it was a custom for the celebrant chanting the thanksgiving hymn *Te Deum laudamus*<sup>20</sup> and “prayers for the emperor and the king”.<sup>21</sup> One of the most important Kingdom officials regularly hosted a lavish lunch in the afternoon: the governor Józef Zajęczek, senator Nikolay Nikolayevich Novosiltsov, or the president of the Administrative Council, count Walenty Sobolewski. The meal was usually accom-

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- 18 In the courtyard of the Saski Palace, “[...] there was finally a mass [...] accompanied by military music and the famous song, ‘God save the King!’ [...]”, *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1818, no. 50, p. 1165.
  - 19 During the mass on the common “[...] regimental music was appropriately played, and selected voices sang the hymn, ‘God save the King!’ [...]”, *Kurier Warszawski* 1822, no. 147, p. 1.
  - 20 Wherever the composer of *Te Deum* was known, I have included the author in the text; the others were probably monodic performances, as part of the liturgy of solemn services of the Catholic Church (sometimes with the accompaniment of an organ or orchestra). “[...] His Excellency Woronicz, senator, the bishop of Krakow celebrated a great mass, after which he sang *Te Deum* played by the orchestra and celebrated a prayer for the emperor and the king [...]”, *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 28 December 1816, no. 104, p. 2309.
  - 21 “[...] the solemn service was celebrated [...] by the Bishop of Krakow, Woronicz and he chanted *Te Deum* played with a selected music [...]”, *Kurier Warszawski* 26 December 1822, no. 308, p. 1.

panied by a “sound of music”.<sup>22</sup> In the evening, the artists of the National Theatre staged a free performance “in front of the illuminated theatre”, which was then located on Komisja Square (from 1815, called Krasiński Square). This “enlightenment of the theatre”, emphasized in many accounts, was due to a new “delicious candelabrum”, installed in the theatre hall in 1816 during a renovation, hanging from the ceiling above the audience, surrounded by lamps that illuminated it.<sup>23</sup>

For the use of occasional scenes additional to performances, decorators prepared paintings, brochures, slides, and allegorical decorations, thematically referring to a given holiday. It required a lot of practice, talent, and artistic craftsmanship. The Italian Antonio Scotti,<sup>24</sup> the successor of Antoni Smuglewicz at the National Theatre, was one of these, as was Justyn Lizander,<sup>25</sup> and a little later – Marcin Zaleski.<sup>26</sup> They continued, among other things, the technique of highlighting a painting made on canvas or paper soaked in wax. Jan B. Plersch, the court artist of King Stanisław August, was considered the master of this medium. All these painters and decorators, working with engineers,<sup>27</sup> transferred to occasional decorations and live paintings the effects previously used in staging popular dramas, operas, and ballets.<sup>28</sup>

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22 It was similar among the military: “[...] the colonels of the Warsaw garrison [...] gave a great dinner [...]; each colonel made a toast, on behalf of his regiment, with the sound of music by the regiments [...]”, *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1815, no. 73, p. 1421.

23 B. Król-Kaczorowska, *Teatr dawnej Polski. Budynki–Dekoracje–Kostiumy*, Warszawa 1971, p. 77.

24 *Słownik Biograficzny Teatru Polskiego 1765–1965*, Warszawa 1973, p. 632. *Rocznik Teatru Narodowego Warszawskiego od I<sup>o</sup> Stycznia 1814. do I<sup>o</sup> Stycznia 1815*, Warszawa, p. 8. *Rocznik Teatru Narodowego Warszawskiego 1815/1816*, p. 9.

25 *Słownik Biograficzny Teatru Polskiego 1765–1965*, p. 386. *Rocznik Teatru Narodowego Warszawskiego 1814/1815*, p. 8; *Rocznik Teatru Narodowego Warszawskiego 1815/1816*, p. 9.

26 At that time, Efraim Gerlitzer was the “main engineer” at the National Theatre, *Słownik Biograficzny Teatru Polskiego*, p. 186; *Rocznik Teatru Narodowego Warszawskiego 1814/1815*, p. 8; *Rocznik Teatru Narodowego Warszawskiego 1815/1816*, p. 9.

27 *Słownik Biograficzny Teatru Polskiego*, p. 632.

28 B. Król-Kaczorowska, *Teatr dawnej Polski...*, pp. 129, 132–133.

The program of free performances featured operas by N. Dalayrac, the master of French comic opera - he was the composer of *Koulouf ou Les Chinois* (20 June 1816), *Gulistan ou Le Hulla de Samarcande* (11 September 1816), and the heroic *Vestal* by G. Spontini (20 June 1821). Ludwik A. Dmuszewski was the translator of the libretto for the last three. Comedy operas and comedies in his adaptations also dominated the programs of many other festive performances: *Szhoda wąsów* (12 November 1815; 11 September 1829), *Pogoń za uciekającym, Indyk nadziany dukatami* (both on 26 October 1816), *Płaksa i Wesołowski, Pięć sióstr a jedna* (both on 24 May 1830), *Grymasy młodej żony* (7 July 1830), and *Kochankowie extrapocztą* (13 July 1830). It is also worth mentioning the premiere of the mythological ballet with music by Kurpiński and I. Moscheles, *Trzy gracie*, staged on the name-day of the great emperor, Grand Duke Konstantin Pavlovich (2 June 1822). [...] At the end of the ballet, a [...] decoration appeared, filled with a wonderful image of Mars and Bellona receiving honours from other Olympian deities. The Genius, who arrived on the cloud, added to such a pleasant picture the birthday number [...].<sup>29</sup>

In over 50 press reports from gala performances at the National Theatre, the performance of the commemorative cantata was mentioned nine times. This is surprisingly little compared to the period after the Uprising. In these records from 1814-1821, the name of Józef Elsner was mentioned twice, Karol Kurpiński five times, and the authors of the music and lyrics were omitted three times. The music of these cantatas has not survived.

1. *Kantata w Uroczystość Imienia Najjaśniejszego Imperatora Wszech Rosyy Aleksandra I, Dnia 11 września 1814 roku Na Teatrze Narodowym w Warszawie śpiewana* [Cantata on the Celebration of the Name Day of the Most Excellent Emperor of Russia, Alexander I, on 11 September 1814, Sung at the National Theatre in Warsaw]. Although part of the Polish lands, whose capital was Warsaw, operated at that time in the

29 *Kurier Warszawski* 1822, no. 130, pp. 1-2. *Kurier Warszawski*, no. 132, p.1. The ballet was preceded by the comedy *Chwila płochości*. J. Pudelek, *Warszawski balet romantyczny (1802-1866)*, Krakow 1968, p. 189.

structures of the Duchy of Warsaw, i.e., under the rule of Frederick Augustus, king of Saxony, Emperor Alexander I seem to Poles to be the resurrector of their own homeland. Before the performance took place at the National Theatre in Warsaw, in the morning, a “solemn service was held” in the palace inhabited by the field marshal Count Barclay de Tolly (commander-in-chief of the Russian army), where there was a Greek Orthodox chapel, and then in St. John’s Cathedral.

[...] His Excellency Bishop [Franciszek] Zambrzycki celebrated a great mass and intoned *Tu Deum* [...]. A great military parade followed [...] in front of His Majesty field marshal, who on that day deigned to have each of the Polish soldiers counted and given the Polish zlotys, and for each of the Russian soldiers fifteen groszy. At about 5 o’clock in the afternoon there was a great dinner at His Majesty field marshal’s place [...]. At the National Theatre that evening, [...] a comedy from the history of Russia was performed: *Najjaśniejsi podróżni* [*The Honorable Travelers*], followed by a scene with a cantata. The scene depicted a temple with an altar in it, with a bust of the Emperor, around which stood four nymphs with garlands. In front of the altar, a famous genius, holding his shield with words: Peace Givers. On both sides of the temple stood the Polish people, both dressed in national clothes, singing songs of the virtues and deeds of Alexander I, [...] which are the work of [...] His Excellency Ludwik Osiński, with the music by His Excellency Elsner [...].<sup>30</sup>

The cantata by Elsner, with recitatives, choir, and declamation, the entire text of which was published in *Gazeta Warszawska*, is mentioned in the studies as *Kantata dedykowana carowi Aleksandrowi I: „Jakaż radość śmiertelnych rozwesela”* [*Cantata dedicated to Tsar Alexander I: “What joy, the mortals cheer up”*] or *Kantata z deklamacją* [*Cantata with declamation*].<sup>31</sup>

2. Cantata for the proclamation of the Kingdom of Poland (20 June 1815).

30 *Gazeta Warszawska* 1814, no. 74, pp. 1301-1303.

31 *Słownik muzyków polskich*, vol. 1: A–L. Kraków 1964, p. 130. A. Nowak-Romanowicz *Klasycyzm*, Warszawa 1995, p. 219.

On 20 June 1815 the proclamation of the Kingdom of Poland was celebrated [...]. After the great Mass [...], the laws [...] were announced; empowered governors of His Imperial Majesty the King of Poland [...] made [...] the oath of tribute and loyalty to His Imperial-Royal Highness and the Constitution. [...] A prayer to God was sung - *Domine salvum fac Imperator et Regem* - which ended the celebration in the church [...]. At 3 o'clock in the afternoon, there was a big dinner for 200 people in the castle rooms [...].<sup>32</sup>

In the evening, a free performance was staged at the National Theatre: the first act of Jan Stefani's opera *Cud mniemany, czyli Krakowiacy i Górale* [*The Supposed Miracle, or Cracovians and Highlanders*], in which “[...] appropriate variations on His Excellency Dmuszewski's arrangement were made, and instead of the second act, there was a new scene with a cantata, with poetry by W. Osiński and the music of His Excellency Elsner and Kurpiński, decorated by the brush of His Excellency Scotti”.<sup>33</sup> The changes introduced in the opera

[...] were significant in the role of a Student who arrived on stage with news from the heir of a village about a happy fate of the country, and this was further used in the work to confront the minds of the feuding peasants. The audience welcomed the scene with common enthusiasm, when the people were ready for battle, but got halted in their enthusiasm by the news, fell on their knees and shouted a verse: 'God be praised! Long live our Poland!' There were no more hostilities between people; with the mutual embrace of the previous feuds, the thing that was the basis of the opera was finished, and all the peasants were called to the court for a feast, and left the stage. Act II replaced the Cantata as follows. The triumphal symphony began with the following performance: After the curtain rose, the village could be seen in a vast illuminated perspective. The poles with garlands of roses created long streets in the slides, and filled the scene with light. In the centre there was a bust of the Emperor and

<sup>32</sup> *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1815, no. 50, pp. 897-898.

<sup>33</sup> *Rocznik Teatru Narodowego Warszawskiego* 1815/1816, p. 15. This mention clearly shows that the author of the text of the Cantata was Ludwik Osiński, and not - as Przybylski claims - Ludwik A. Dmuszewski. *Studia i materiały*, vol. 4, Warszawa 1980, pp. 298, 473.

King on its base decorated with the coat of arms of the Kingdom. The castellan, heir of the village where the opera is operated, surrounded by numerous people of both genders, from the neighbourhood and family, said: 'Tak, zacni przyjaciele, spełnione marzenia!' ['Yes, good friends, dreams come true!']. First choir: 'Polacy, w pieniach weselnych! Głośmy wybawcę tey ziemi!' ['Poles, with happy songs! Let us praise the savior of the earth!']. Singing Duo: 'Kto cierpiącym łzy ociera' ['Who wipes the tears of those who suffer']. Singing quartet: 'Za tyle łask, tyle trudów kray ci swą wiarę przysięga' ['For so many favours, so many hardships, the country gives you its vow of faith'].<sup>34</sup>

3. Cantata for the birthday of Alexander I (24 December 1815). The whole performance consisted of the Dalayrac's opera *Dwa słowa, czyli Noc w lesie* [Two Words, or Night in the Forest], the opening night of Kurpiński's opera *Nagroda, czyli Wskrzeszenie umarłych* [Prize, or the Resurrection of the Dead], and the Cantata.<sup>35</sup> In the streets, the attention was particularly drawn to

[...] the front of Olier's house in Nowy Świat [...] with a huge pyramid-shaped slide, covering the most of this building up to the top and covering 640 square feet [which] expressed most of all: Firstly: A temple in the serious Egyptian style, made of granite, inside which, on the ancient altar, glowed a picture of the Emperor and King in a Polish uniform, girded with a golden serpent (as an emblem of immortality). Above the portico of the temple, a white eagle hovered in columns (*verde antico*), its wings shaped the middle part of the cornice (*giallo antico*). On the sides, on two eastern jasper tablets, the following words could be read: [inc.:] 'Nature in the human foetus [...] The generous wins.' Secondly: Above the temple rose up to the top, a glowing golden letter 'A' for the name of Alexander, dear to Poles, in which field the enormous Alexander Tower appeared, counted among the wonders of the world, illuminating two harbours, and the city of Alexandria was lost in perspective. Above the portico of the tower, among the delicious armature, one could see the bust of

34 *Gazeta Warszawska* 1815, no. 50, 24 VI, pp. 917–918.

35 *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1815, no. 102, supplement 2, p. 2021; *Gazeta Warszawska* 1815, no. 102, pp. 2051, 2055. Karol Kurpiński. *Kronika*, p. 473 (the author considered the Cantata to be Kurpiński's composition).

General Zajączek, the royal governor, under which the following inscription, taken from the scripture, could be read: 'You are set up as a guardian on the tower above His sheepfold.' Above the second porch of the tower, the following inscription could be read: 'There lived an incomparable knight in this strange monument.' The eye of providence in heaven ended the pyramid as the survivor, and a ray from its torch hit the golden ball floating above the tower and illuminated the whole area. Thirdly. Finally, the sides of the entire edifice, up to 50 feet long, illuminated by light, showed the letter 'A' at a distance, without in any way underestimating the effect of the slide.

Moreover, it was noted that

[...] a new *Te Deum* of His Excellency Elsner's composition was to be performed in the St. John Cathedral by the national orchestra, to which some members of the Music Society contributed with their talents. Also some members of the Society, on behalf of all, sang a serenade to their protector His Excellency Prince Adam Czartoryski on the 22<sup>nd</sup> day in evening.<sup>36</sup>

4. Cantata for the name-day of Empress Maria Fedorovna (3 August 1817). Its performance was preceded by the opera *Hilary, czyli Ubiegający się za awanturkami* [*Hilary, or the pursuit of adventures*] by N. Isouard.

[...] After the play was over, the Cantata was sung and the poem *O radości* ['Oh Joy'] was read in front of the number [...] of that day could be seen, framed with roses and rays in the slide, and the temple adorned between the columns. A cantata related to the music of His Excellency Kurpiński, by double choirs, into which almost the entire company of our actors and actresses was divided, sung in front of and behind the figure at a distance, and played by two orchestras, was pleasantly received [...].<sup>37</sup>

<sup>36</sup> *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1815, no. 104, pp. 2059–2060.

<sup>37</sup> *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1817, no. 61 supplement, p. 1355; *Gazeta Korrespondenta Warszawskiego i Zagranicznego*, no. 62, supplement, p. 1371. K. Kurpiński. *Kronika*, p. 473 (text attributed to K. Brodziński; incorrect date of performance).

The poem “O radości” was recited by the actor and singer of the National Theatre, Marcin Szymanowski.<sup>38</sup>

5. Cantata for the birthday of Alexander I (23 December 1817). It was sung on the eve of his birthday. The description of the performance is the quintessence of expectations related to the rebirth of the Kingdom of Poland under the rule of the Romanovs.

[...] After playing the comedy [*Odwet czyli Zapoliska*, that is *Revenge, or Mrs. Zapsolski*], there was a Cantata with music by His Majesty Kurpiński, during which two images of living people appeared. The first showed Virtue with its retinue [...]: Faithfulness [...], Justice [...], Innocence [...], virtuous marriage [...], and virtuous love [...].

The first picture was accompanied by a solo song with poems by Mr. Brodziński: *Cnota jest piękna, wesoła* ('Virtue is Beautiful, Happy'), *W gwiaździstej swojej odsłonie* ('In its Starry View') [...].

The second image [is] a combination of Light and Virtue. In the background there is the Sun and a bust of His Excellency Emperor and King in front. On his right, Apollo embracing Virtue, and between them a Genius holding the Cornucopia. On the same side, people holding the emblem of sciences and craftsmanship that is a globe, book, lyre, etc. On the left, Justice led by Time and leaned on Religion; on that side, people with a plough, an anchor, and a hammer, picturing the three main sources of wealth for the country, which are Agriculture, Trade and Handicrafts. [...] With this painting, the quartet of voices sang: [inc.] *Prózno na piasek słońce śle oświaty* ('In vain the sun sends light to the sand') [...]. The General Choir ended: [inc.] *Chwała ci w gronie twych dzieci* ('Glory to you in the company of your children') [...].<sup>39</sup>

6. Cantata for the name-day of Empress Maria Fedorovna (3 August 1819). It was performed between the comedy *Młodość Henryka V* [*The Youth of Henry V*] and the ballet *Święto serc, czyli Powinszowanie* [*Feast of the Hearts, or Congratulations*]. The Cantata was “a hymn

38 *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1817, no. 61 supplement, p. 1579. See also: *Słownik Biograficzny Teatru Polskiego*, p. 717.

39 *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1817, no. 103, p. 2195. B. Gubrynowicz Kazimierz Brodziński, *Życie i dzieła. Część pierwsza [...]*, Lwów 1917, p. 246. A. Nowak-Romanowicz, *Klasyczny...*, p. 221. Przybylski does not include this piece: K. Kurpiński. *Kronika*, pp. 316, 473.

appropriate to the ceremony, sung by two choirs with the accompaniment of two orchestras and a declamation”, “and in front of a number shining in the slide”.<sup>40</sup> Its staging resembles a production from two years ago (see Cantata 4).

7. Cantata for the birthday of Alexander I (23 December 1819). It was performed on the eve of his birthday, after the tragedy *Horacjusze [Horatians]* and the opera (“comedy opera”) *Kazimierz Wielki i Brózda, czyli Król chłopów* (*Casimir the Great and Brózda, or the King of Peasants*).<sup>41</sup> “[It was] sung with the appearance of an appropriate slide, and clearly expressed national feelings [...].”<sup>42</sup> On the birthday celebration of Alexander I, and at the same time on the anniversary of “the founding of the Charity Society, the Society held a general meeting [...]. It was preceded by a service in the church of the Society and the prayer of *Te Deum* [...].”<sup>43</sup>

8. Cantata for the birthday of the Grand Duke Konstantin Pavlovich (9 May 1820) was the final element of a larger

visual performance, interspersed with a selection of music and concerts. Among others, it was pleasant to see the image showing the Treaty of Khotyn [1621] between Poland and the Ottoman Port [the Ottoman Empire] in the presence of Prince Władysław [Sigismund Vasa] with the body of Karol Chodkiewicz (from Baciarelli’s original), and farewell to the army leaving the settlement (according to the drawing of the state judge Zieliński). Finally, the Cantata of His Majesty Kurpiński was performed, during which a picture suitable for the ceremony was shown. The Geniuses raised and held various emblems and signs of the armies led by the Great Prince. On the altar

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40 *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1819, no. 63, p. 1191; *Gazeta Warszawska* 1819, no. 63, supplement, p. 1523. *Karol Kurpiński, Kronika*, pp. 314–315, 473 (author of the libretto is unknown).

41 The composer of the music for the libretto by Kazimierz Majeranowski was probably Baltazar Boguński, although Józef Wygrzywalski’s vaudeville is also mentioned to Majeranowski’s libretto of the same title, *Słownik muzyków polskich*, vol. 1, p. 43; *Słownik muzyków polskich*, vol. 2, p. 297.

42 *Gazeta Warszawska* 1819, no. 103, p. 247; *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1819, no. 102, p. 1353; *Gazeta Korrespondenta Warszawskiego i Zagranicznego*, no. 103, p. 1361; *Gazeta Korrespondenta Warszawskiego i Zagranicznego*, no. 104, p. 1383.

43 *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1819, no. 104, p. 1382.

surrounded by Bellona's priestesses, an offering was burning, with the birthday number hovering above it [...].<sup>44</sup>

9. The cantata for the name-day of Alexander I (11 September 1821) ended the performance consisting of the comedy *Koszyk wiśni* (*A Basket of Cherries*) and the comedy opera *Plaksa i Wesołowski* (*Plaksa and Wesołowski*), “[...] during which the following picture appeared: an altar burning and surrounded with gratitude by religion, justice and wisdom, on both sides Geniuses kept signs of victory and various emblems. The view of Parnassus filled the depths, with signs of increasing or renewed craftsmanship and sciences [...]”.<sup>45</sup>

The establishment of the Kingdom of Poland was also honoured by the “society of friends of religious and national music” by performing in the Piarists' Church *Te Deum* by J. Elsner, “[...] who has recently composed it to thank the Lord of heavens for regaining the name of Poles dear to us, and to show gratitude to the new king”.<sup>46</sup> This work, published by the Leipzig company of Breitkopf and Härtel, has so far been quoted in the studies under alternative titles: *Post celebrem..., D major op. 11*<sup>47</sup> or *Hymnum Ambrosianum in D major, Op. 11*.<sup>48</sup> According to the preserved manuscript in the Czartoryski Library in Kraków, Ryszard Mączyński finally identified it as *Te Deum laudamus*, described by Elsner in his work *Sumariusz*.<sup>49</sup>

The commemoration of the establishment of the Kingdom of Poland (20 June) was systematically and solemnly celebrated from 1816 to 1830, and a relatively large amount of space was devoted to

44 *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1820, no. 48, p. 963; *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1820, no. 49, 12 V, p. 971. *Karol Kurpiński, Kronika*, p. 473 (incorrect performance date).

45 *Kurier Warszawski* 1821, no. 216, p. [2]; *Kurier Warszawski*, no. 218, p. [1].

46 *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1815, no. 51, supplement, p. 929.

47 *Encyklopedia Muzyczna PWM*, vol. 3: efg, p. 24.

48 R. Mączyński, *Muzyka i teatr. W kręgu kultury zakonnej Warszawy XVII–XIX wieku*, Toruń 2018, pp. 49, 285, [330–331].

49 *Słownik Muzyki Polskiej*, vol. 1, p. 130. The International Music Score Library Project (IMSLP), Elsner Józef.

it in newspapers.<sup>50</sup> Although it did not appear in printed Warsaw calendars until 1819<sup>51</sup> and was called a holiday until 1834<sup>52</sup> – it was not celebrated after the Uprising. Only in 1832, in the headline of the *Kurier Warszawski*, was there a small note referring to it: “Celebration in Warsaw 1815”.<sup>53</sup>

The anniversaries of the name-day and birth of Emperor Alexander I and later, Nicholas I, were equally ceremonial and received extensive descriptions in newspapers. Such was the celebration of the name-day of Alexander I on 11 September 1816, which was important due to the hymn with Alojzy Feliński's lyrics: *Boże coś Polskę*. That day,

[...] the Grand Duke [Konstantin], dressed in a Polish uniform [...], went to the courtyard of the palace called Saski, in the middle of which there was an altar under a tent sheltered on all sides [...]. Mass was celebrated at the altar, known as the episcopal rite [...] with the presence of higher and lower clergy. [...] The song *Boże [coś Polskę]* was still sung to the sound of military music [...], and after the Mass, the hymn *Te Deum* amid the sounds of the cannons. When the service was over, the entire army, armed, was standing in line before the royal governor [...].<sup>54</sup>

The aforementioned singing had already satisfied Grand Duke Konstant, as had the music of Jan N. Kaszewski, with “voices selected from among the military sing this song every Sunday during the military church parade in the Carmelite Church, and the rest of the army sings in a choir ending each stanza [...]”.<sup>55</sup>

50 *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1816, no. 50, p. 1151; 1818, no. 50, p. 1165; 1819, no. 50, p. 959; 1820, no. 73, p. 1270; *Kurier Warszawski* 1821, no. 147 p. [1]; 1822, no. 147, p. [1]; 1824, no. 147, p. 277; 1825, no. 146, p. 697; 1826, no. 146, p. 601; 1827, no. 165, pp. 693–694; 1830, no. 164, p. 857.

51 *Nowy Kalendarz Polityczny na Rok 1819*, Warszawa [1818], p. 15; Cf. *Kalendarz Malý Piarski Polski i Ruski na Rok Przeszły 1820* [...], Warszawa [1819], p. 27.

52 A. Gałżowskiego i Komp. *Kalendarz Domowy Na Rok Zwyczajny 1834* [...]. Warszawa [1833], p. 9.

53 *Kurier Warszawski* 1832, no. 165, p. 865.

54 *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1816, no. 74, pp. 1695–1696.

55 *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1818, no. 50, p. 1165; 1820, no. 73, p. 1269; *Kurier Warszawski* 1822, no. 147, p. [1]; 1823, no. 146, p. [1]; 1830,

At the beginning of the 1820s, political events in Warsaw intertwined with the exceptionally dynamic development of music editing.<sup>56</sup> A new audience emerged, craving “salon music” for piano, an instrument that was becoming more and more important. It was believed, not without reason, that the salon was the most important institution in the entirety of musical Europe, where opinions about musicians were shaped that significantly influenced their careers.<sup>57</sup> Warsaw composers noticed this situation, and printmaking and lithograph workshops printing note sheets were able to satisfy this demand with their products – musical pieces printed on a copper plate or lithographic stone. Teaching music, singing, and piano, along with learning to dance, became a compulsory element of young women’s education, both at home and at private and state schools. They were also introduced in the new Institute of Governesses [*Instytut Guvernantek*], established in 1825, which was transformed a year later into the Government Institute of Female Education [*Instytut Rządowy Wychowania Płci Żeńskiej*], classified as a “Practical institute”. There were two hours of “instrumental and voice music” and a week for “all three departments”, “so that future governesses were prepared to teach these subjects thoroughly. Whenever there is an opportunity, the teachers will try to bring their talents to a decent development”.<sup>58</sup> Music was taught by Jan Cyrsznitz, Józef Jawurek, Józef Linowski, and Józef Szanior, while singing was taught by Aleksander Celli, and dance by Ludwik Thierry.<sup>59</sup> Already at that time, the Institute adopted the

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no. 164, p. 857. *Gazeta Warszawska* 1816, no. 58, p. 1321. A. Nowak- Romanowicz, *Klasyczny...*, pp. 209–210.

56 W. Tomaszewski, *Edytorstwo muzyczne na ziemiach polskich w latach 1815–1875*. in: *Ludzie i książki. Studia historyczne*, Warszawa 2006, pp. 310, 314.

57 “In the Warsaw milieu, an important role was played by amateur musicians to whom composers dedicated their works”.

58 “Urządzenie Instytutu Rządowego Wychowania Płci Żeńskiej”, 22 November 1826, in: *Zbiór przepisów administracyjnych Królestwa Polskiego. Wydział Oświecenia*, vol. 5, pp. 381, 385.

59 *Nowy Kalendarzyk Polityczny Na Rok Zwyczajny 1829 [...]*, Warszawa 1828, p. 161; ibidem, *Nowy Kalendarzyk Polityczny Na Rok Zwyczajny 1830 [...]*, Warszawa 1829, p. 176; *Rocznik Polityczny Polski*, Warszawa 1830, p. 74.

principle of the participation of female students in services and celebrations, and “on the days commemorating the anniversaries of the Monarch’s Family [...] there will be prayers: for health, long life and well-being of the Members of the Ruling Family”. Two holidays were emphasised: the anniversary of the foundation of the Institute and the empress’s name-day.<sup>60</sup>

There were also occasional dances on gala days. These were not only individual pieces performed at performances and balls, but also entire collections, which became more attractive in print, thanks to their court provenance.<sup>61</sup> Most of them were composed by Karol Kurpiński. In 1819, he was appointed the Master of the Polish Kingdom Court Band, a title granted to him by the tsar. He published occasional polonaises converted from orchestra to piano.<sup>62</sup> Occasional dances were also written by Józef Bielawski,<sup>63</sup> Józef Damse,<sup>64</sup> Maleczyński vel Maleciński,<sup>65</sup> Jan Rywacki,<sup>66</sup> Józef Stefani,<sup>67</sup> and Jan Nepomucen Wański.<sup>68</sup>

60 “Urządzenie Instytutu Rządowego Wychowania Płci Żeńskiej...”, pp. 396–397.

61 “Tańce na pfte grane na balu u Księcia Namiestnika danym dla Najjaśniejszego Cesarza w dniu jego imienin [11 September 1820]”, in: W. Tomaszewski, *Bibliografia warszawskich druków muzycznych* Warsaw 1992, ref. 192. “Terpsychora czyli Zbiór naynowszych i naybardziej ulubionych w Towarzystwach Warszawskich rozmaitych tancow na pianoforte No. 9” in: ibidem, ref. 280. “Tańce na pfte grane na balu u Księcia Namiestnika w dniu 11IX 1821 jako w uroczystość jego dostoynych imienin”, in: ibidem, ref. 278.

62 Karol Kurpiński. *Kronika*, pp. 347–348; *Gazeta Warszawska* 1819, no. 100, supplement, p. 2395.

63 “Nowy polonez na orkiestrę, grany pierwszy raz w Teatrze Wielkim w uroczystość imienin Cesarza, ułożony na pfte”, in: *Bibliografia warszawskich...*, ref. 465; S. Burhardt, *Polonez. Katalog tematyczny*, vol. 2, Kraków 1976, ref. 1792–1830. This polonaise is not registered. It received applause three times when it was performed for the first time on 11 September 1821, between the comedy opera *Trzy upiory* [*Three Ghouls*] by J. Wygrzywalski and opera *Kalif Bagdadu* by Boieldieu [*Le calife de Bagdad*], *Kurier Warszawski* 1823, no. 217, p. [1].

64 *Bibliografia warszawskich...*, ref. 141, 225, 759.

65 Maleczyński aka Maleciński was most likely the second violinist in the orchestra of the National Theatre, “Rocznik Teatru Narodowego Warszawskiego”, 1815/1816, p. 6.

66 *Bibliografia warszawskich...*, ref. 734; *Kurier Warszawski* 1825, no. 111, p. 549.

67 *Bibliografia warszawskich...*, ref. 532.

68 Ibidem, ref. 212.

Kurpiński composed and published a few polonaises related to the gala days of interest to us from September 1818 to May 1834.<sup>69</sup> Between these dates, there is a record of 15 such polonaises<sup>70</sup> and one mazurka.<sup>71</sup> Some of his polonaises were performed not at balls, but at the National Theatre, during gala performances, such as *the Polonaise for 11 September 1825 as the annual celebration of the name day of the His Majesty Emperor and the Polish King [...]*. In fact, it was performed for the first time on the eve of the name-day of Alexander I “at the National Theatre by 90 artists, that is, 50 orchestras and 40 singers of both genders [...]”, at the end of the performance consisting of the overture to the opera Łaskawość Tytusa [*La Clemenza di Tito*] by W. A. Mozart, scenes of reconciliation from the comedy Bracia niezgodni [*Bruderzwist*], and the third act of G. Rossini’s opera *La gazza ladra* and the fifth act of the tragedy *Cynna czyli Łaskawość Augusta* [*Cinna o la clemenza di Augusto*], while Kurpiński’s Polonaise was followed by “various dances”.<sup>72</sup> It should also be noted that the first performance of another Kurpiński’s polonaise, at the ball on 1 June 1830, should be associated with the eve of the name-day of the Grand Duke Konstantin, although the title of the work does not directly indicate it.<sup>73</sup> *Polonaise and mazurkas* of Damse, one of the Kurpiński polonaises, *Mazurka* by Maleczyński, and other orchestral dances<sup>74</sup> were performed at the “great ball given by the Duke Governor” on the occasion of the name-day of Alexander I in 1821,

69 “Dwa polskie tańce [...] na dzień balu [...] dla [...] Maryi Teodorównej [...] przez [...] w miesiącu wrześniu r. 1818 [...]”, *Bibliografia warszawskich...*, ref. 88; *Polonez. Katalog tematyczny*, vol. 2, ref. 1508–1509; *Karol Kurpiński. Kronika*, p. 480, ref. 121–122.

70 “Polonez grany na balu w sali Giełdy d. 4 maja 1834 ro. z powodu uroczystego ogłoszenia pełnoletniości [...] Następcy Tronu Aleksandra Mikołajewicza [...]”, *Bibliografia warszawskich...*, ref. 1786; *Polonez. Katalog...*, vol. 2, ref. 1527; *Karol Kurpiński. Kronika*, p. 485, ref. 163.

71 *Polonez. Katalog...*, vol. 2, ref. 1511, 1512, 1514–1526. “Mazurek na pfte grany na balu u księcia Namieśnika w dniu 9 maja 1825 r”, *Bibliografia warszawskich...*, ref. 678.

72 *Kurier Warszawski* 1825, no. 214, p. 972; no. 217, p. 981. On the emperor’s name-day itself, there was a drama with dances *Teresa czyli Sierota z Genewy*, free of charge, ibidem, no. 215, p. 976.

73 “Polonaise composée pour le bal à la cour le 1. juin 1830 [...]”, *Polonez. Katalog...*, ref. 1526. *Kurier Warszawski* 1830, no. 146, p. 757; no. 147, p. 765.

74 *Bibliografia warszawskich...*, ref. 225, 242, 278, 280, 437.

“which was honored by the presence of the monarch’s three brothers and the Grand Duchess Alexandra [...]”.<sup>75</sup>

Changes in the throne of the Russian Empire were followed by changes in the calendar: celebrations directly related to Alexander I disappeared from the calendar of holidays, and new ones related to his successor, Nicholas I, were introduced.<sup>76</sup>

The official information about the death of Alexander I (November 1825) appeared in Warsaw dailies with a significant delay. Warsaw funeral ceremonies at St John Cathedral began on Friday, 7 April 1826, according to the extensive program published in the *Kurier Warszawski*. Earlier, to prepare for the rite, common services were moved from St John’s Cathedral to the Augustinian Church and St Cross Church.<sup>77</sup> The funeral procession consisted of 124 groups of mourners in eleven groups, in which the “funeral music group” was between the Missionary priests (group III: “Clergy and orphans”) and the students of the Second Faculty School (group IV: “Teaching Institute”). Groups III and IV were to gather “at the beginning of Długa Street [...] until the German Hotel [...]. In the church, when everyone was seated, the Mass with singing began. The *Requiem* by J. Kozłowski was conducted by Carlo Soliva. After the sermon, “the rest of the Mass was sung with the accompaniment of Mourning Music”, and after the Mass, at the catafalque, the hymn *Salve Regina* was performed. After the Mass, the “rite of the Royal Almsgiving” began to nine churches (Bernardines; Daughters of Charity; Carmelites; Visitandines; Evangelical; St Andrew’s; Piarists; Basilians; Capuchins; St John’s Cathedral); “Each time the procession stops to give alms, the mourning music can be heard in the vicinity”.<sup>78</sup> In the description of the ceremony, some details were later clarified:

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75 *Kurier Warszawski* 1821, no. 218, p. [1].

76 Cf. *Kalendarzyk Kieszonkowy Polski i Ruski z odmianami powietrza zawierający święta i dni Galowe w Imperium Rossyjskim i Królestwie Polskiem [...] na rok 1829 [...]*, Warszawa 1828.

77 *Kurier Warszawski* 1826, no. 62, p. 249, no. 71, p. 281.

78 *Kurier Warszawski* 1826, no. 78, pp. 309–311, supplement, pp. 313–320.

when the coffin and the bust were placed on a catafalque erected in the middle of the church, 150 musical artists of both genders performed the *Miserere* by Pergolesi [...].<sup>79</sup> During the Mass, *Requiem* by Kozłowski was performed, which he had once arranged for the mourning celebration in St. Petersburg after the death of King Stanisław August.<sup>80</sup> The Mass ended with the song *Salve Regina* by Salieri; all these music pieces were performed under the direction of professor Soliva [...].<sup>81</sup>

*Gazeta Korrespondenta* corrected that “not 300 but 180 people entered” to perform Kozłowski’s *Requiem*.<sup>82</sup>

After the main funeral service, five more services with the same intention were held in the following days, according to *Gazeta Korrespondenta*, and according to *Kurier Warszawski*, six more. The difference in the numbers is due to the fact that *Kurier* – unlike *Gazeta Korrespondenta* – also counted the service that took place “in the metropolitan church” on Tuesday, 11 April, according to the Greek Orthodox rite. Here is a detailed program of these services, with a description of the music performed:

- 8, 10 April; Saturday, Monday; second and third celebrations at St John’s Cathedral; “Mozart’s *Requiem*, famous in the musical world, was performed by 315 artists and amateurs under the direction of Karol Kurpiński”;<sup>83</sup>
- 11 April, Tuesday; fourth celebration at St. John’s Cathedral; “A great Mass was celebrated by His Excellency bishop of Chełm and senator of the Kingdom Ciechanowski, according to the Greek Orthodox rite [...]. During the entire service, Orthodox chants were performed [...]”;<sup>84</sup>

79 In the daily *Monitor Warszawski*, it was noted: When the mar, *Miserere* by Pergolesi was introduced, it was enforced by 250 artists in the church, *Monitor Warszawski* 1826, no. 44, p. 197.

80 A. Nowak-Romanowicz, *Klasyczny...*, pp. 241–242.

81 *Kurier Warszawski* 1826, no. 83, pp. 337–338.

82 *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1826, no. 58, p. 663.

83 *Kurier Warszawski* 1826, no. 84, p. 341; no. 86, p. 349.

84 *Kurier Warszawski* 1826, no. 87, p. 353.

- 12 April, Wednesday; fifth celebration at St John's Cathedral; “Mozart's *Requiem* was performed for the third time [!] under the direction of Karol Kurpiński”,<sup>85</sup>
- 13 April, Thursday; the last (sixth) celebration connected with the celebration of “the transfer of the Royal Insignia from the Cathedral to the General Treasury of the Kingdom of Poland”, located in the Krasiński Palace; at St. John's Cathedral, “Kozłowski's *Requiem* was performed under the direction of Soliva”.<sup>86</sup>

The Jewish community and Evangelicals also had mourning celebrations. In the case of the first, the celebrations lasted two days:

[...] in the house no. 2064 on Zielona Street, 2 rooms were decorated in black cloth and enlightened [...]. At 10 o'clock, the rabbi stood in front of the altar [...] and cried. *It was a time of mourning*: he began the service with his usual initial prayer. *How beautiful are your sanctuaries, Jacob*, etc. The whole prayer was sung by a cantor with the accompaniment of several voices and instrumental music. Then the rabbi began singing Psalm 23 and the cantor continued with everybody else (*Israel. 24*) *Pańska jest ziemia* etc. [...]. After the finished speeches [...], appropriate verses were selected from the sacred psalm (119 the Israelites), the initial letters of which combine into the name Alexander: the rabbi pronounced them, the cantor sang them with music, and all Israelites present repeated them. Then the cantor sang with music, a customary prayer for the deceased [...].<sup>87</sup>

In the Evangelical church (at Królewska St.), the service commemorating the death of Alexander I was attended by several thousand people.

[...] In sermons in Polish and German, local preachers mentioned the reasons for this rite eloquently; both sermons were separated by music; 140 artists under the direction of His Majesty Jaworek,

<sup>85</sup> *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1826, no. 59, p. 673; *Kurier Warszawski* 1826, no. 87, p. 353.

<sup>86</sup> *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1826, no. 59, p. 673; *Kurier Warszawski* 1826, no. 88, p. 357.

<sup>87</sup> *Gazeta Korrespondenta Warszawskiego i Zagranicznego* 1826, no. 64, p. 721; *Kurier Warszawski* 1826, no. 92 p. 373–374.

performed a beautiful *Requiem* by rector Elsner, arranged for only male voices, with the accompaniment of only some instruments, and the majestic choir invented in Warsaw, so pleasant for the audience, which made an impression [...].<sup>88</sup>

The score of this work was published in November 1826 by Warsaw lithograph workshop of A. Brzezina,<sup>89</sup> and in August of the following year, Nicholas I “deigned to decorate” the composer with an “expensive diamond ring” for composing and performing it during the aforementioned celebrations.<sup>90</sup>

As a ruler, Nicholas I was not as loved by Poles as his brother Alexander. One even has the impression that the anniversary of the death of the “restorer” of the Kingdom of Poland (1 December) celebrated in the following years was treated with greater solemnity than court holidays related to the new ruler. On the anniversary of the death “of the one to whom we owed our being and our happiness, a mourning service was held at 11 am in the metropolitan church of St. John [...]. Selected singers and music artists performed the famous Mozart’s *Requiem* with diligence [...].”<sup>91</sup> According to *Kurier Warszawski*, the piece was then performed by 130 artists under the direction of K. Kurpiński.<sup>92</sup> On the second anniversary of the death of Alexander I,

[...] the Guard regiments were in the squares of their barracks, and all other troops were in the churches: Carmelites, S. Cross at the Alexandrian Barracks, Franciscans, Missionaries, Piarist and S. Alexander. At 11 o’clock in the archi-cathedral, a great Mass was celebrated [...] by a bishop of Kalisz, a senator of the Kingdom His Excellency Koźmian [...]. Musicians performed *Requiem* under the direction of Rector Elsner [...].<sup>93</sup>

88 *Kurier Warszawski* 1826, no. 97, p. 393.

89 *Bibliografia warszawskich...,* ref. 768.

90 *Kurier Warszawski* 1827, no. 214, p. 917. Elsner also gave copies of his *Requiem* to the king of Prussia and to the Emperor of Austria, and, in return, he obtained two valuable diamond rings (*Kurier Warszawski* 1826, no. 296, p. 1257; 1827, no. 85, p. 341).

91 *Gazeta Warszawska* 1826, no. 192, p. 2737.

92 *Kurier Warszawski* 1826, no. 286, p. 1217.

93 *Kurier Warszawski* 1827, no. 324, p. 1357.

Similarly, the fourth anniversary of the death of Alexander I was commemorated with the performance of the “*Requiem of Rector Elsner’s and under his direction*” in the cathedral. On the eve of this anniversary, *Phaedo, or On the Immortality of the Soul in Three Dialogues* by the famous philosopher M. Mendelsohn, which was over 350 pages long, was published. It was translated into Polish by J. Tugendhold, Member of the Secretary of the Censorship Committee for Hebrew Books and Writings and “dedicated to the blessed shadow of this immortal monarch”.<sup>94</sup> The anniversaries of Alexander I’s death were also celebrated after the Uprising, including in 1835 in the citadel, and the unveiling of his monument was preceded by a service in the castle chapel, during which the “tender chants of the bishop’s choir” could be heard.<sup>95</sup>

After Nicholas I ascended the throne, all ceremonies were mentioned in the headlines of the newspapers, according to the custom, and with changes resulting from the passage of time. For example, in 1828, 24 ceremonies were commented on, the list of which can be found in the calendars.<sup>96</sup> Nevertheless, although solemn church services and quite often free theatre performances were still the norm, there were not as many balls as before. Fewer occasional pieces were composed by Warsaw musicians as well. Józef Damse composed a march for the entire military orchestra to commemorate the birthday of the Grand Duke Konstantin in 1826.<sup>97</sup> Karol Kurpiński composed the Polonaise *Pocztarka* for the name-day of Nicholas I in 1828 and on that day, it was performed by the “great orchestra of the Polish Grenadier Regiment”.<sup>98</sup>

From 1825 to December 1830, 15 free performances were given at the National Theatre related to the birthday and name-day of

94 *Kurier Warszawski* 1829, no. 324, p. 1451.

95 *Kurier Warszawski* 1835, no. 323, pp. 1625-1626.

96 For example, *Nowy Kalendarz Domowy na Rok Przestępny 1828 mający dni 366*, Warszawa [1827], p. [4].

97 *Kurier Warszawski* 1826, no. 148, p. 609.

98 *Kurier Warszawski* 1829, no. 40, p. 193; *Bibliografia warszawskich...*, ref. 1185; Karol Kurpiński. *Kronika*, p. 485 ref. 158.

Nicholas I, the birthday and name-day of Aleksandra Fiodorovna, his wife, the name-day of the heir to the throne Alexander Nikolayevich, and the anniversary of the Russian coronation of Nicholas I. There were no special cantatas and outstanding stagings in those years.

The Warsaw coronation (24 May 1829) of Nicholas I and Aleksandra Fiodorovna as Polish monarchs was a special event. The program was announced in *Kurier Warszawski* in a special supplement on 14 May. It was planned that “on the eve of the coronation, vespers would be sung in all the churches of the capital; followed by the *Te Deum* as an expression of thanksgiving will be sung”.<sup>99</sup> Preparations for the coronation lasted several days because they were building “[...] a gallery in front of the Castle, where 2,000 ladies are to be located. Musicians have rehearsals of *Te Deum* by Kurpiński, High Mass by Rector Elsner and *Veni Creator* by Rector Soliwa, arranged for this ceremony [...]”.<sup>100</sup> “Yesterday Paganini came to Warsaw to please the enthusiasts eagerly waiting to hear this famous master; today at the National Theatre, instead of an ordinary performance, this virtuoso gives a concert. The crowd waiting for tickets is extraordinary; the price for all seats is doubled, and for chairs it is tripled”.<sup>101</sup> On the day of the coronation at St John’s Cathedral, “[...] the great Mass began, during which 300 artists performed new music of Rector Elsner and under his direction. There were prayers and *Veni Creator* during which the music of His Majesty Soliwa was performed and under his direction [...]”.<sup>102</sup> They returned to the Castle to perform the coronation rite, and then once again went to St John’s Cathedral, and

[...] Their Excellencies entered the church, the new *Te Deum* was performed, arranged for this ceremony under the direction of the author of this work, K. Kurpiński [...]. At 3 o’clock in the afternoon

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99 *Kurier Warszawski* 1829, no. 129.

100 *Kurier Warszawski* 1829, no. 136, p. 591.

101 *Kurier Warszawski* 1829, no. 138, p. 600.

102 *Kurier Warszawski* 1826, no. 139 p. 604.

there was a feast at His Excellency's. The table in the concert hall of the Royal Castle was wonderfully decorated. There were 130 people of both genders at the table. [...] During the dinner, musicians under the direction of [...] Karol Kurpiński performed the overture of Rossini from the opera *The Siege of Corinth*; students of the Conservatory and the tenorist Tejchman sang Soliwa's compositions; the famous Paganini played a solo and Mrs. Meier sang a great aria with the accompaniment of the choir. (The musician in the church, and also later, was the first violinist of the Royal Polish Court, Lipiński, who came to Warsaw the other day) [...].<sup>103</sup>

The commemoration of this coronation briefly acquired the status of an informal gala ceremony and was celebrated a year later. The comedy *Pięć sióstr a jedna*, the comedy opera *Plaksa i Wesołowski*, and “dances with an appropriate picture” were staged at that time.<sup>104</sup>

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The fall of the November Uprising fundamentally changed the political situation of the Kingdom of Poland. Nicholas I, dethroned at that time, introduced the Organic Statute limiting all liberties in place of the liberal constitution and incorporated the Kingdom into the structures of the Russian Empire as an integral part of it. Everything that could underline or remind people of the native Polishness of these lands was gradually erased.

This situation had a specific impact on the catalogue of gala days and the way they were celebrated in Warsaw. From then on, their descriptions in newspapers had a more of a propaganda-like character. They were unified in their content in a way that was related to the characteristic style of the reports and equipped them with permanent phraseological elements, emphasising the allegedly spontaneous joy of the celebration. The New Year's celebration, according to the Orthodox calendar, was permanently included in the catalogue, and it was distinguished by its particularly sumptuous balls. In journalistic reports, the descriptions of the outfits

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103 *Kurier Warszawski* 1829, no. 139, pp. 604–605.

104 *Kurier Warszawski* 1830, no. 137, p. 704; no. 139, p. 713.

that the ladies wore for the occasion were considerably long. Two imperial Russian decorations were also added to the calendar of days of celebration: Imperial Order of Saint Equal-to-the-Apostles Prince Vladimir (4 October) and the Order of St Andrew the Apostle the First-Called (12 December).<sup>105</sup>

Until the mid-1930s, there was a certain transition period in the way of celebrating and communicating about gala days. The first new festive cantata by Kurpiński was not mentioned until 1836. At that time, the education of church singing began in government schools; thus, school students joined the celebration of the gala days.

New Year's Eve costume balls, arranged at the Warsaw Castle by the Governor of the Kingdom, became a tradition since then. On this day in 1832, before the dances followed the supper,

[...] in the great ballroom, in the newly arranged theatre, the artists of both Polish theatres presented a comedy *Popas* by Count Skarbek, which ended with songs and a village wedding; after it, the French artists presented the comedy *The Peasant of Picardy*; between the acts there were overtures of exemplary composers performed by the orchestra of the National Theatre under the direction of K. Kurpiński [...].<sup>106</sup>

This information included the name of the National Theatre, as it was only at the beginning of the next year that a new theatre building was officially opened under its changed name - Teatr Wielki. In 1938, at this kind of a ball, "the orchestra played all dances from the most favorite themes from *Robert the Devil*, an opera by G. Meyerbeer, which had its Warsaw premiere three weeks earlier".<sup>107</sup> Artists from Warsaw theatres also joined the celebration of New Year's balls, presenting in 1840 "a few excerpts from the comedy *Nowy Teatr* and *Sunset*", and moreover, artists of the War-

105 *Kalendarzyk Kieszonkowy Polski, Ruski i Żydowski Z odmianami powietrza, zawierający święta dni galowych w Rosji i Królestwie Polskim na rok 1830 [...]*, Warszawa [1829], p. 41, 49. "A. Gałęzowskiego i Komp. Kalendarz Domowy Na Rok Zwyczajny 1833 [...]", Warszawa [1832], p. 9. I use the modern names of the orders.

106 W. Tomaszewski, *Kronika życia muzycznego Warszawy w latach 1831–1835*, Warszawa 2011, ref. 27.

107 *Kurier Warszawski* 1838, no. 13, pp. 61–62.

saw ballet danced a polonaise, a mazurka with figures, and a Spanish bolero.<sup>108</sup>

Some of the New Year's balls were preceded by a meeting. And so the guests of the "dancing" evening, on the eve of 1837, were honoured with the presence of the Viceroy and his wife. The meeting was organized in the apartments of the palace of the Government Commission for Revenue and Treasury by its director – Roman Fiodorowicz Fuhrman.<sup>109</sup> In later years, such balls, also attended by Viceroy with his family, were held by the princes Jabłonowski and the count Zamoyski family. Adam Sturm's orchestra used to perform, *inter alia*, the newest Parisian contradances by Philippe Musard, as well as mazurkas by the conductor Napoleon Kurzatkowski.<sup>110</sup>

Announcements and comments related to the celebration of holidays were usually given in newspapers as the first information in the section devoted to local events. Occasionally, less important holidays were signalled only in the headline, and only the most important ones were commented on in more detail.<sup>111</sup> The novelty of the post-Uprising period was a clearer separation of information about services in the main churches of various faiths, especially in the Orthodox chapel of the Warsaw Castle (where the governor of the kingdom and his entourage were usually present), in the Roman Catholic cathedral of St John, and later, in the Orthodox Church of the Holy Trinity in Podwale and the Roman Catholic cathedral. Moreover, after the obligatory participation of students in services, a relevant paragraph was devoted to the singing performed by them. The entire report from the ceremony ended with

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108 *Kurier Warszawski* 1840, no. 13, pp. 61–62.

109 *Kurier Warszawski* 1837, no. 12, p. 57.

110 *Kurier Warszawski* 1838, no. 12, p. 57; 1842, no. 12, p. 58; 1843, no. 12, p. 53; *Bibliografia warszawskich...*, ref. 2743.

111 For example, in *Kurier Warszawski*, the headline in each issue was as follows: to the left of the highlighted journal title, the date and the name of the day of the week were given; on the right – which saints were celebrated the following day and what would be the holiday. *Kurier Warszawski* 1848, no. 196, p. 957; 1849, no. 44, p. 209.

information about a free theatre performance, during which all opera and theatre artists sang the occasional cantata, and there was a festive illumination of government buildings.

The first holiday in the new political situation was the anniversary of the name-day of the heir to the throne, the Grand Duke Alexander Nikolayevich (11 September 1831). There was a “service in the castle chapel, in the presence of the emperor, the Grand Duke Michael, as well as senior officers from the Russian Army, present in Warsaw”.<sup>112</sup> Until the end of this year, all holidays in the calendar were announced or mentioned in Warsaw dailies. Only the day of the name-day of Nicholas I (18 December 1831) was celebrated more solemnly, and a concert was given by “outstanding artists” in the residence of the Warsaw governor of war, which ended with a “cantata composed for this celebration”.<sup>113</sup> It cannot be ruled out that it was a piece composed by Kurpiński, as the musician retained the title of court bandmaster after the fall of the November Uprising.<sup>114</sup>

The next seven free gala performances (from July 1832 to July 1833) were held in the building of the former National Theatre at Krasiński Square.<sup>115</sup> Occasional cantatas were sung in three of them. The celebration of the name-day of the heir to the throne, the Grand Duke Alexander Nikolayevich (11 September 1832), was distinguished by fireworks “in the garden called Foxal”, where “there were 1224 people”.<sup>116</sup> The performance related to the name-day of Empress Alexandra Feodorovna (3 May 1833) was preceded by the morning service at St. John’s Cathedral, during which an orchestra of artists and amateurs performed a composition by J. Haydn.<sup>117</sup> Another free performance (in September 1833) took place in the new building of the Teatr Wielki, where – as it was

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<sup>112</sup> *Gazeta Warszawska* 1831, no. 243, p. 1965; *Kurier Warszawski* 1831, no. 246, p. 1205.

<sup>113</sup> *Kronika życia muzycznego...*, ref. 5.

<sup>114</sup> Karol Kurpiński. *Kronika*, pp. 434–435.

<sup>115</sup> *Kronika życia muzycznego...*, ref. 311, 319, 391, 514, 692, 765, 772.

<sup>116</sup> *Kurier Warszawski* 1832, no. 245, p. 1293.

<sup>117</sup> *Dziennik Powszechny* 1833, no. 121, p. 467.

reported – “[...] yes to the loges [!], As well as to all other seats, no one will be admitted without a ticket. All tickets will be distributed in the office [!] Of the municipal office”.<sup>118</sup> On two days of December ceremonies of the same year (2 December and 18 December), there were three performances, two for free – at the Teatr Wielki (at 6 am) and in the Teatr Dawny Rozmaitości (at 5 am) – and a paid one at the Nowy Teatr Rozmaitości (at 7 am). On 2 December, the opera *The Freeshooter* by C. M. Weber was presented at the Teatr Wielki for free, while at the Teatr Dawny Rozmaitości, there were two one-act comedies: *Mali protektorowie, czyli Boczne schody* and *Trafila kosa na kamień*.<sup>119</sup> Two attractive premieres were presented at a paid performance at the Nowy Teatr Rozmaitości: the comedy *Kto kocha ten się kłoci* and the comedy opera *Trzy pojedynek bez prochu*, with music by J. Damse.<sup>120</sup> On 18 December, in turn, the recently reissued comedy *Dwóch Siecichów* and “dances with an appropriate image” were presented for free at the Teatr Wielki, the comedy *Sluga dwóch panów* (*Servant of the Two Lords*), a comedy opera *Przez Sen*, with music by J. Damsy, and a paid performance of the comedy *Mirandolina czyli Piękna gospośia* (*Mirandolina or Beautiful Housewife*) at the Teatr Dawny Rozmaitości, and a comedy-opera *Kłamca prawdę mówiący* (*The Truth Telling Liar*) with music by W. Kratzer.<sup>121</sup> The next two gala performances (in the summer of 1834) took place in the Łazienki amphitheatre, and it was only after autumn in 1834 that free performances returned to the Teatr Wielki at Marywilska Square.

Gala performances in the Łazienki amphitheatre in summer, with a stage located on the island, became the custom after that, although it sometimes happened that they had to be moved under

118 *Gazeta Codzienna* 1833, no. 596, p. 8.

119 *Kurier Warszawski* 1833, no. 338, p. 1812.

120 *Kronika życia muzycznego...*, ref. 949. Encyklopedia Muzyczna PWM vol. 2, p. 332. No such piece of Damse was recorded, for which he received PLN 24 (Protocol from the Nowy Teatr Rozmaitości, 11 September 1833, f. 6v., ms. in the Jagiellonian Library).

121 *Kronika życia muzycznego...*, ref. 970–972.

the roof of the Teatr Wielki due to bad weather. The entire park around the amphitheatre used to be illuminated in the evening together with the “Łazienki Palace, the canal’s waterfront, the Sobieski Bridge, the cascade, the guard house and the groves”. The “delightful scenes of *Sylfida*” presented there were especially praised, when “the orchestras on the terrace and illuminated boats performed”, and “after the theatre play ended [...], military orchestras placed at various points performed excerpts from operas and ball dance music, and the voice of the choir could be heard in intermezzos”.<sup>122</sup> The ballet *Mimili, czyli Styryjczykowie* delighted everyone, “which looked even more decorated due to the place of its performance [...], with the artists in boats sailing along the canal [...] [and] singers sitting in the first boat were performing appropriate songs to the accompaniment of guitars”.<sup>123</sup>

The day the heir to the throne - the Grand Duke Alexander Nikolayevich - was announced was very festive, especially since it was combined with the empress’s name-day (4 May 1834). On that day, the dedication of the Alexandrian citadel took place, and from then on, on holidays, its 101 cannons were fired during every *Te Deum* chanted in the morning at St. John’s and St. Trinity churches. It was during the consecration of its walls that senior government officials and a deputy of Warsaw citizens congratulated Viceroy on the occasion of “becoming adult” and the heir to the throne. Later, “[...] Viceroy [...] gave a great dinner in the castle rooms [...]. The music in the salons and on the terrace perfectly performed the compositions of today’s most favoured composers [...].”<sup>124</sup> “[...] In a dozen or so squares of the capital, they were still playing music until late, and the people danced and had fun [...]”,<sup>125</sup> and “on all the streets the music was played from evening until midnight” on positive organ.<sup>126</sup> In the Saski Garden, accompanied by music,

122 *Kurier Warszawski* 1841, no. 184, p. 881.

123 *Kurier Warszawski* 1841, no. 242, p. 1153.

124 *Kurier Warszawski* 1834, no. 121, p. 661.

125 *Dziennik Powszechny* 1834, no. 123, p. 641.

126 *Dziennik Powszechny* 1834, no. 119, p. 621.

a sports show of “fast runner” Hieronim Pawłowski was held. In addition, two balloons were released. “[...] The failure of the physicist of the first balloon which resulted in its catching fire entertained a merry audience”.<sup>127</sup> The Warsaw synagogue supervision,

[...] a few days before this ceremony issued [...] a notification, notifying that on Saturday (on the eve of the ceremony) a prayer for the king’s welfare should be sung in every synagogue: *Hanoten Theszua*, and on the day of the ceremony, after the morning service, psalms 21, 45 and 72. These psalms were sung in all synagogues in Warsaw, and in the synagogue on Danielewiczowska Street the service was held with harmonious music [...].<sup>128</sup>

Moreover, the local Jewish community

[...] had the honor of presenting to His Excellency Viceroy [...] imprinted on the white satin in the shape of Moses tablets, a Hebrew poem of the Abraham Sztern,<sup>129</sup> next to the Polish text, translated by Jan Glüksberg<sup>130</sup> [...] *The Expression of Joy Due to the Birthday and Turning 16 Years Old of His Majesty [...] Alexander Nikolayevich*<sup>131</sup> [...].

[...] in the spacious courtyard of Posner’s house<sup>132</sup> [...] the same Synagogue Supervision gave a dinner for the poor. Three hundred poor people were notified, while dinner was prepared for 500, and that number came. During the feast, music was played from two porches on the 1<sup>st</sup> floor [...].<sup>133</sup>

Free performances were given in the Wielki and Mały Theatres: in the first of them, the comedy *Mieszczanin szlachcicem* and the ballet *Wesele w Ojcowie*, and in the second, the comedy *Nauka mężom, czyli Żona zazdrośna* and the comedy opera *Przez sen*.

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127 *Gazeta Warszawska* 1834, no. 121, p. 1211; no. 139, p. 1403.

128 *Gazeta Codzienna* 1834, no. 826, p. 1.

129 Abraham Sztern – member of the Society of the Friends of Sciences, then rector of the Warsaw Rabbinical School.

130 Jan Glüksberg – Warsaw bookseller.

131 Salomon Marcus Posner, then a member of the Synagogue Supervision.

132 *Gazeta Codzienna* 1834, no. 825, p. 2.

133 *Gazeta Codzienna* 1834, no. 826, p. 1.

[...]<sup>134</sup> Due to the free admission, the theatres were filled with audiences. The performance in the great theatre ended in a delicious way showing a temple of glory decorated with numbers of Their Majestys' Birthday. The opera artists sang *God save the Emperor*, and the orchestras repeated the song in the squares.<sup>135</sup>

[At dusk], [...] all the houses shone with light [...], in many houses there were appropriate slides, and the town hall was decorated with columns of colored lamps and the monarch's figures. Above all, the view of the square in front of the Bank was delicious, because the whole dome and the bank building, the palace of the Treasury, the Zamojski palace and the apartment of the princes Zajączkowa shone with tens of thousands of lamps, and on the house of the former Kossecki family there was a huge slide showing a magnificent colonnade with imperial emblems. The ball in bank halls given by the citizens of the Mazowiecki region and the city of Warsaw was one of the most splendid; there were over 2,000 people. The beautiful and spacious rotunda was decorated with a rare taste [...]; The candlestick suspended under the dome [...] carried 500 sparkling candles, and in the same room 3500 candles were lit [...]. At the entrance of the Principality, there was a Polish dance performed by 130 artists with the singing and all instruments of Kapellmeister Karol Kurpiński's compositions, to which Ludwik Osiński [...] composed poetry [...]. The supper was given in the adjoining salons of the Treasury Palace [...]. When His Majesty Prince Warszawski performed [a toast] to the health of His Excellency [...], a cantata performed in a great theatre was repeated [...]. After supper, when the entire assembly returned to the rotunda, the artists sang *Slava! Fame!* in the Russian language [...]. The architecture of all the halls where this great ball was held, was designed by the builder Gay;<sup>136</sup> carpentry by brothers Jan and

134 The musicians of the orchestra of the Rozmaitości Theatre received 73 zlotys for their performance, "Protokoł z Nowego Teatru Rozmaitości...", f. 17r., ms. in the Jagiellonian Library.

135 *Gazeta Warszawska* 1834, no. 121, p. 1212; ibidem, Year 3, Warszawa 1848, pp. 41, 43.

136 Jakub Gay was one of the most famous Warsaw architects, a member of the Royal Institute of Architecture in London and the Imperial Academy of Fine Arts in Saint Petersburg. He built, among other things, the building of the Bank of Poland at Bank Square in Warsaw and the obelisk in honour of Tsar Alexander I in the Warsaw Citadel. He is mentioned in the Warsaw calendars as a builder having "the right to practice in Warsaw and the entire Kingdom", *Kalendarzyk Informacyjno-Kieszonkowy Na Rok 1848. Przez Antoniego Rousseau*, Year 2, Warszawa 1847, p. 17; Year 3, Warszawa 1848, p. 17.

Frydryk Hejnrich, and upholstery by Mr Nejgebauer<sup>137</sup> [...]. Women mostly wore satin and crepe white dresses at the ball, Bavette style, without decoration, mostly distinguished one was a pale blue à la Sevini; head ornaments composed of headbands, small roses or ears of corn [...].<sup>138</sup>

The city authorities had previously ordered

[...] when arriving with the horse carriages with people invited to the ball, the following should be done: [...] all vehicles should go along Senatorska Street around the Town Hall, along Bielańska Street, Długa Street, around the Arsenal Street on the left, along Przejazd Street and Rymarska Street to the Bank. The carriages from which the people at the Bank get off, go straight from the Bank along Przechodnia street and get ready on Za Żelazną Bramą Square, and when there is no space there, they should stand on Grzybowski Square. Carriages waiting for Gentlemen going home from the ball, from Za Żelazną Bramą Square and Grzybowski Square, are to arrive along Zimna and Elektoralna Streets in front of the Bank.<sup>139</sup>

At the ball, the orchestra also performed many other dances - apart from the aforementioned polonaise - which were soon published by Warsaw publishers of notes in a piano arrangement. Among them were *Favorite Mazurka* composed by A.W., the aforementioned *Polonaise* by Kurpiński, a *Waltz* dedicated to Miss D. Janasz, the *New Cotillion in 6 Parts*, and the *Viennese Waltz* by Edward Wolff.<sup>140</sup>

In total, by 1850, more than 130 free theatre performances took place on festive days. The cantata, which ended more often than began a free performance, is mentioned over 110 times. However, the editors did not quite distinguish between the "classic", occasional cantata, from the anthem of the Russian Empire introduced after 1833 with the music of Lvov. In one of the accounts, it is stated explicitly that at the end of the performance, the "can-

<sup>137</sup> Heinrich is registered among carpenters and Nejgebauer among upholsterers in: *Kalendarz Informacyjno-Kieszonkowy na rok 1848. Przez Antoniego Rousseau*, Year 2, Warszawa 1847, pp. 41, 43.

<sup>138</sup> *Kurier Warszawski* 1834, no. 120, p. 655.

<sup>139</sup> *Kurier Warszawski* 1834, no. 118, p. 641 ; 1847, no. 185, p. 891.

<sup>140</sup> *Bibliografia warszawskich...,* ref. 1742, 1786-1787, 1807, 1846, 1849, 1858.

tata *God protect the emperor [...]*" was sung, that is, the anthem of Lvov.<sup>141</sup> The program of occasional performances consisted of plays of great popularity in previous years: mainly comedies, comedy-operas, slapstick and ballets, or ballet dances. The opera (or part of it) and the melodrama appeared relatively rarely, and the drama was staged only once. In total, during these performances, over 250 presentations of various works were given (some titles appeared many times): ballets - no less than 79 (including *Fletrowers zaczarowany, czyli Tancerz mimo woli* [*The Magic Traverso, or involuntary dancer*] 26 times and *Dwa posągi* [*The Two Statues*] 15 times), comedy - no less than 75 (including *Kto wie na co się to przyda* [*Who knows how useful it is*] seven times and *Przez sen* [*In a dream*] six times), and no less than 66 (including *To byłam ja* [*It was me*] nine times).

Contrary to the period before the Uprising, the decorations and effects accompanying the occasional cantatas were scarcely described. They were performed mainly before the "shining birthday number" and "applauded". At the end of the 1840s, more and more space was devoted to the description of decorative banners on government buildings. This type of decoration, called "optical view", appeared for the first time on the front of the palace of the Government Commission for Internal and Religious Affairs, "composed of the most colourful coloured glass" and decorated with "a number and a royal crown, the coat of arms of the Kingdom of Poland and the coats of arms of its five provinces [...]" . It was, as stated in the note, "a work of taste and exquisite grandeur".<sup>142</sup> Two years later, on the building of the Government Commission of Justice, it was noted that the front "houses the letters needed for the ceremony, presented in flowers in the most vivid colours. Above the letters there is an oak crown, and below the letters, the coat of arms of the Kingdom. On the sides of the pedestals are the emblems of Justice and Wisdom. Everything is presented in the newest Gothic style [...]" .<sup>143</sup>

141 *Kurier Warszawski* 1848, no. 179, p. 874.

142 *Kurier Warszawski* 1847, no. 185, p. 891.

143 *Kurier Warszawski* 1840, no. 320, p. 1697.

The author of these decorations was Jakub Pik, who held the title of honourary optician and mechanic of Warsaw.<sup>144</sup>

Karol Kurpiński, as the composer of the “appropriate” cantata, is mentioned 17 times in the reports from festive performances. Neither of them survived. Twelve of them were found to be new pieces, and the remaining five were probably repetitions of earlier performances:<sup>145</sup>

1. Cantata for the name-day of Nicholas I (18 December 1836), to the text by Dmuszewski. *Wielka Nowa*, sung and played by “130 opera, orchestra and choir artists” after the comedy *Burmistrz oberzysta* and the ballet *Myśliwi*.<sup>146</sup>
2. Cantata for the birthday of Nicholas I (7 July 1837), to the text by Dmuszewski. “Performed by all opera artists” after the comedy opera *Pan domu* [Man of the House] and the comedy *Sluga dwóch panów* [Servant of two masters].<sup>147</sup>
3. Cantata for the birthday of Empress Alexandra Feodorovna (13 July 1837), to the text by Dmuszewski. “Composed for this day [...], a particularly delightful song”, performed after the farce *Przez sen* [In a dream] and the comedy opera *Dwóch guwernerów, czyli Asinum asinus fricat* [The two Tutors, or Asinum asinus fricat].<sup>148</sup>

<sup>144</sup> At that time, he had a workshop at 493 Miodowa St. He owned, among other things, “Magneto-electric earpieces to strengthen blunted hearing and relieve chronic headache, and amulets, i.e., electrical extractors for rheumatic and nervous weaknesses, privileged new English invention [...]”, *Kurier Warszawski* 1848, no. 179, p. 880.

<sup>145</sup> *Kronika życia muzycznego...*, ref. 1246; *Karol Kurpiński. Kronika*, pp. 441-442, 473.

<sup>146</sup> In addition, two cantatas with Kurpiński’s music and Dmuszewski’s poetry were performed during occasional festive performances, i.e., outside the basic set of these holidays that we are interested in. The first of them is a cantata performed on 26 July 1839 (Dmuszewski’s poetry, “Bóg co dobrem ludzi darzy”) in the Łazienki amphitheatre on the occasion of the wedding of the great princess Maria Nikolayevna with the duke of Leuchtenberg Maximilian, *Kronika życia muzycznego...*, ref. 5593; the second was performed on 9 May 1841 (Dmuszewski’s poetry, “new, appropriate for the ceremony”) at the Grand Theatre on the occasion of the wedding of the Emperor, heir to the throne, Alexander Nikolayevich, with the great princess Maria Alexandrovna, *Encyklopedia Muzyczna PWM*, vol. 5, p. 239; *Karol Kurpiński. Kronika*, pp. 455-456, 474; *Gazeta Codzienna* 1841, no. 125, p. 4; *Gazeta Warszawska* 1841, no. 125, p. 1; *Kurier Warszawski* 1841, no. 124, pp. 589-590.

<sup>147</sup> *Kronika życia muzycznego...*, ref. 2187; *Karol Kurpiński. Kronika*, pp. 443, 473.

<sup>148</sup> *Kronika życia muzycznego...*, ref. 2215; *Karol Kurpiński. Kronika*, pp. 443-444, 473.

4. Cantata for the name-day of Emperor Alexander Nikolayevich (11 September 1837). “Written for this ceremony” by Dmuszewski (*Synu pierworodny Pana [Oh the Lord’s firstborn Son]*), to which “Kapellmeister Kurpiński composed new music with exemplary talent”, performed after the comedy operas *Siedem dziewcząt pod bronią [Seven maidens in arms]* and *Schadzka, czyli Pasztet z węgorza [The Rendezvous, or the eel pâté]*.<sup>149</sup>
5. Cantata for the 12<sup>th</sup> anniversary of the enthronement of Nicholas I (2 December 1837), to the lyrics by Dmuszewski. “Performed by all opera artists” after the melodrama *Marnotrawcy [The spenthrifts]*.<sup>150</sup>
6. Cantata for the birthday of Emperor Alexander Nikolayevich (29 April 1838), to the lyrics by Dmuszewski. “Performed by all opera artists” after the comedy *Głuchy, czyli Pełna oberża [The deaf man, or the inn]* and the comedy opera *Obiadek z Magdusią [Dinner with Magdusia]*.<sup>151</sup>
7. Cantata for the name-day of Empress Alexandra Feodorovna (3 May 1838), the author of the text was not specified. Performed by “double choirs and orchestras” after the comedy *Bracia niezgodni*.<sup>152</sup>
8. Cantata for the birthday of Nicholas I (7 July 1838), to the lyrics by Dmuszewski. Performed in the Łazienki amphitheatre after the comedy opera *Antoni i Antosia* and the ballet *Młynarze [The Millers]*.<sup>153</sup>
9. Cantata for the name-day of Emperor Alexander Nikolayevich (11 September 1838), to the lyrics by Dmuszewski. Performed after the comedies *Ubogi poeta [A poor poet]* and *Doktor z musu [An involuntary doctor]*.<sup>154</sup>

149 *Kronika życia muzycznego...,* ref. 2410; Karol Kurpiński. *Kronika*, pp. 444, 473.

150 *Kronika życia muzycznego...,* ref. 2844; Karol Kurpiński. *Kronika*, pp. 444–445, 473–473 (opening night date is approximate).

151 *Kronika życia muzycznego...,* ref. 3711; Karol Kurpiński. *Kronika*, pp. 446, 474; (opening night date is approximate).

152 *Kronika życia muzycznego...,* ref. 3724. Przybylski does not mention this Cantata; it can be assumed that it was the same Cantata that was performed on 13 July of the previous year.

153 *Kronika życia muzycznego...,* ref. 3919; Karol Kurpiński. *Kronika*, pp. 448, 474.

154 *Kronika życia muzycznego...,* ref. 4164. Przybylski does not mention this Cantata; it can be assumed that it was the same Cantata that was performed on 11 September of the previous year.

10. Cantata for the name-day of Nicholas I (18 December 1838), to the lyrics by Dmuszewski. The cantata was “appropriate to celebration” and performed after the melodrama *Król duchów alpejskich* [King of Alpine ghosts] and ballet dances.<sup>155</sup>
11. Cantata for the birthday of Emperor Alexander Nikolayevich (29 April 1839), to the lyrics by Dmuszewski. It was an “appropriate” cantata, performed after the comedy *Okno zamurowane* [A bricked up window] and *Gulnara niewolnica perska* [Gulnara, the Persian slave].<sup>156</sup>
12. Cantata for the name-day of Empress Alexandra Feodorovna (3 May 1839), the author of the text was not specified. “With a joyful message, [the cantata was] performed by 2 choirs composed of opera artists and 2 orchestras” after the comedy *Głuchy, czyli Pełna oberża* and the ballet *Fletrowers zaczarowany, czyli Tancerz mimo woli*.<sup>157</sup>
13. Cantata for the birthday of Nicholas I (7 July 1839), to the lyrics by Dmuszewski. “Performed (solo) by Her Majesty Maria Turowska, and choirs composed of all opera artists” after the comedy *Nauka mężom, czyli Żona zazdrośna* and the ballet *Młynarze*.<sup>158</sup>
14. Cantata for the birthday of Empress Alexandra Feodorovna (13 July 1839), the author of the text was not mentioned. The cantata *O radości* was performed in the Łazienki amphitheatre after the overture from M. Glinka’s opera *Żyzń za caria*, the comedy *To byłam ja*, and the ballet *Dwa posągi*.<sup>159</sup>
15. Cantata for the name-day of Emperor Alexander Nikolayevich (11 September 1839), to the lyrics by Dmuszewski (*Synu pierworodny*

155 *Kronika życia muzycznego...,* ref. 4649; *Karol Kurpiński. Kronika*, pp. 448, 474.

156 *Kronika życia muzycznego...,* ref. 5315; *Karol Kurpiński. Kronika*, pp. 449, 474.

157 *Kronika życia muzycznego...,* ref. 5331. Przybylski does not mention this Cantata; it can be assumed that it was the same Cantata that was performed in previous years.

158 *Kronika życia muzycznego...,* ref. 5547. Przybylski does not mention this Cantata; it can be assumed that it was the same Cantata that was performed in previous years.

159 *Kronika życia muzycznego...,* ref. 5557; *Karol Kurpiński. Kronika*, pp. 449, 474; (wrong place of the performance).

- Pana). The cantata was performed after the drama *Prawo angielskie* and the ballet *Fletrowers zaczarowany, czyli Tancerz mimo woli*.<sup>160</sup>
16. Cantata on the anniversary of the enthronement of Nicholas I (2 December 1839), the author of the text was not mentioned. It was performed “under the direction of Kurpiński” after the comedy *Sluga dwóch panów* and the ballet *Dwa posągi*.<sup>161</sup>
17. Cantata for the name-day of Nicholas I (18 December 1839), to the lyrics by Dmuszewski. Performed after the comedy *Ton modny pod schodami* and the ballet *Fletrowers zaczarowany, czyli Tancerz mimo woli*.<sup>162</sup>

In those years, among the Warsaw musicians, the bandmaster of the Main Staff of the Active Army Aleksander Pohlens distinguished himself as a composer and conductor. He was appreciated by Elsner and Kurpiński, especially for the way he intelligently included military choristers “to perform great compositions”.<sup>163</sup> One gets the impression that with time, he might have replaced Kurpiński in the role of the court bandmaster. Already “at the ball in the Łazienki Palace on the occasion of the birthday of Nicholas I on 7 July 1834”, his new Mazurka attracted attention,<sup>164</sup> and his *Polonoise with the Song “God Save the Emperor”* composed for an orchestra with choirs, opened a ball the following year. His Polish dances were successful too during the balls in 1839 and 1842–1843,<sup>165</sup> while his other dances dominated the repertoire of the New Year’s party in 1849, to a “general satisfaction”.<sup>166</sup> The orchestra, conducted by

160 *Kronika życia muzycznego...*, ref. 5739. It is the same Cantata which was performed on 11 September 1837. *Karol Kurpiński. Kronika*, p. 450.

161 *Kronika życia muzycznego...*, ref. 6084; *Karol Kurpiński. Kronika*, pp. 451, 474.

162 *Kronika życia muzycznego...*, ref. 6191; *Karol Kurpiński. Kronika*, p. 474.

163 *Ruch Muzyczny* 1859, no. 3, p. 24; L.T. Błaszczyk, *Dyrygenci polscy i obcy w Polsce działający w XIX i XX wieku*, Kraków 1964, p. 225.

164 *Bibliografia warszawskich...*, ref. 1804.

165 *Bibliografia warszawskich...*, ref. 1926, 2735, 2854; *Kronika życia muzycznego...*, ref. 4816; *Kurier Warszawski* 1843, no. 21, p. 93; S. Burhardt, *Polonez. Katalog...*, vol. 3, Krakow 1985, ref. 936–937.

166 These were, among others, *Kontredanse* from the favourite ballet *Paquita*; *Kontredanse* from various opera themes; New Year’s polka and two Mazurkas. *Kurier Warszawski* 1849, no. 13, p. 57; *Bibliografia warszawskich...*, ref. 3563.

Pohlens, also played at balls not only on festive days in the Warsaw Castle<sup>167</sup> and gave a kind of “New Year congratulations” concert to the Viceroy of the Kingdom “at Zygmuntowski Square in front of the Castle”, performing appropriate military marches, including the fashionable *Marche triomphale d’Isly* op. 30 by Leopold de Meyer<sup>168</sup> and new marches by the conductor. In the latter case, the orchestra, “consisting of five choirs, regimental musicians with drummers, signalist, etc. [...] consisted of 600 people”.<sup>169</sup>

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In the calendars of the Russian Empire, court and religious holidays and victory days “free from public employment” were designated, and on some of these days, students were also free from schools. *Te Deum* was sung in churches at that time, along with the prayers on the days dedicated to the emperor and victories.<sup>170</sup> After the Uprising, the celebration of the gala days celebrated in Warsaw by students changed significantly after the education began again in government schools in 1833.<sup>171</sup> At the end of 1834, “choir teachers at gymnasiums and district schools [...]”<sup>172</sup> were introduced. It was then allowed that students “on Thursdays after lunch, who wished it”,<sup>173</sup> could learn “church singing from the score”.<sup>174</sup> Moreover, there was a designated (at the end of the school year) “a day

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167 Bibliografia warszawskich..., ref. 1806, 2056, 2387, 2648.

168 *Kurier Warszawski* 1848, no. 14, p. 66.

169 *Kurier Warszawski* 1850, no. 13, p. 69.

170 *Kalendarz Astronomiczno-Gospodarski Ułożony Podług Stylu Juliuszowego na Rok Pański MDCCCVIII [...],* Berdyczów 1807, pp. 15–16; *Kalendarz Gospodarski na Rok Pański MDCCCXXII Ułożony Podług Starego Stylu [...],* Berdyczów 1821, p. 17.

171 J. Schiller, *Warszawskie rządowe szkoły średnie w latach 1795–1862*, in: *Rozprawy z dziejów oświaty*, vol. 36, Warszawa 1994, p. 79; *Korrespondent Warszawski* 1833, no. 209, p. 876; *Kurier Warszawski* 1833, no. 206, p. 1100.

172 *Pamiętnik Muzyczny Warszawski* 1836, no. 5, p. 79.

173 “Wyciąg z najwyższej w r. 1833 zatwierdzonej ustawy dla gimnazjów, szkół obwodowych i elementarnych czyli parafialnych w Królestwie Polskiem”, in: *Zbiór przepisów ad-ministracyjnych Królestwa Polskiego. Wydział Oświecenia*, vol. 3, p. 137.

174 Wyciąg z najwyższej w r. 1840 zatwierdzonej ustawy dla gimnazjów, szkół obwodowych i elementarnych czyli parafialnych w Królestwie Polskiem”, in: *Zbiór przepisów ad-ministracyjnych Królestwa Polskiego. Wydział Oświecenia*, vol. 3, p. 245.

for a celebration, to which guests, especially parents of students and local authorities, were invited”,<sup>175</sup> and from then on, students sang during services related to it. Schools positively assessed this change because – in their opinion – it added “a proper sublimity to the school service”. Participation in the services of gala days was obligatory for students. The list could be found, for example, in the Warsaw Pocket Calendar for the Year 1835,<sup>176</sup> where eight days were distinguished out of 29 on which students should celebrate in a special way. From that time on, it happened more and more often that students of various Warsaw schools on the same festive day, at the same time, sang polyphonic religious pieces in several different churches and in the school synagogue of the Rabbinical School.

Initially, education was resumed in two gymnasium schools in Warsaw and in four district schools. Such as:

- District Gymnasium (former Warsaw Liceum), in the Kazimierz Palace; Józef Stefani<sup>177</sup> continued teaching music and singing there; students celebrated their gala days in the nearby Visitandines Church or in their own chapel.
- Second Gymnasium school (former Provincial School of the Piarists), at Leszno St., after 1842 at Nowolipki St.; teaching singing was entrusted to Józef Piltz,<sup>178</sup> and when the school

<sup>175</sup> “The celebration at the end of the year of study at the Warsaw Junior High School in Leszno Street will take place on 30 July 1835 [...] in a room of the Działyński Palace, to which [...] Tomasz Dziekoński, the director of the school, invites”, Warsaw 1835, p. 4.

<sup>176</sup> *Kalendarzyk Polityczny na rok 1838 wydawany [...] przez Fr. Radziszewskiego [...],* p. 135; and in subsequent issues of *Kalendarzyk Polityczny... 1839*, p. 136; 1840, p. 138; 1841, p. 146; 1842, p. 128; 1843, p. 195; 1844, p. 290; 1845, p. 282; 1846, p. 281; 1847, p. 282; 1848, p. 280; 1849, p. 280; *Rocznik Urzędowy obejmujący spis naczelnych władz Cesarstwa oraz wszystkich władz i urzędników Królestwa Polskiego na rok 1850*, p. 505. *Encyklopedia Muzyczna PWM* vol. 10, Kraków 2007, p. 90. Stefani later also became a teacher at the Warsaw Gymnasium and as such, he is listed there for the first time in 1851, *Kalendarzyk Polityczny... 1851*, p. 561.

<sup>177</sup> Warsaw, printing workshop of A. Gałuszowski i Spółka, unnumbered p. 6.

<sup>178</sup> *Kalendarzyk Polityczny...1837*, p. 143; 1838, p. 135; 1839, p. 136; 1840, p. 138; 1841, p. 147 (Józef Piltz previously taught music at the Piarists' Konwikt Warszawski as “a meter used for private lessons”. “Popis Publiczny Uczniów Konwiku Warszawskiego xx. Pijarów na Żoliborzu [...]”, Warsaw 1828, unnumbered p. 5; 1829, unnumbered p. 5; R. Mączyński, *Muzyka i teatr...*, pp. 205–206.

moved to Nowolipki St., to Emilian Schwarzbach;<sup>179</sup> in 1848 it was transformed into an élite Nobles' Institute; the students celebrated their gala days in the nearby Carmelites Church or in their own chapel.

- district school at Długa St. (the former Piarist Provincial School); later at Freta St. as a district school; E. Schwarzbach<sup>180</sup> was the choir teacher there, and later, Adam Ostrowski;<sup>181</sup> in 1843, after the school was moved to Gęsia St.,<sup>182</sup> singing was taught by Konstanty Striebel,<sup>183</sup> and later, Walenty Striebel;<sup>184</sup> students gathered at gala services in the churches of St. Spirit (formerly of Pauline Fathers), and later the Franciscans and Dominicans.
- district school in Muranów; Church singing was initially taught (Faculty School) by Wojciech Migatulski,<sup>185</sup> then by E. Schwarzbach,<sup>186</sup> and K. Striebel;<sup>187</sup> the students celebrated their gala days in the Church of the Brothers Hospitallers.
- district school at Królewska St.; in 1838–1841, Tomasz Skapczyński<sup>188</sup> was a choir teacher there, and in 1842–1843, it was

179 *Kalendarzyk Polityczny...* 1842, p. 129; 1843, p. 197; 1844, p. 292; 1845, p. 284; 1846, p. 282; 1847, p. 283; 1848, p. 281.

180 *Kalendarzyk Polityczny...* 1838, p.135; 1839, p.137; 1840, p. 139; 1841, p. 148.

181 *Kalendarzyk Polityczny...* 1842, p. 130; 1843, p. 198.

182 *Kurier Warszawski* 1843, no. 235, p. 1121.

183 *Kalendarzyk Polityczny...* 1844, p. 293; 1845, p. 284; *Kurier Warszawski* 1846, no. 241, p. 1149; 1847, no 115, p. 541.

184 *Kalendarzyk Polityczny...* 1848, p. 281; 1849, p. 281; *Rocznik Urzędowy...* 1850, p. 509 (transcription of the surname: Sztrybel).

185 "For a performance by students of the Faculty School in Muranów, which is to be held on 24 and 25 July, the Honorable Audience on the behalf of the Institute is invited by Rector Leopold Sumiński", Warszawa 1832, p. 5; *Bibliografia warszawskich...*, ref. 2043-2045; *Kronika życia muzycznego...*, ref. 114, 334.

186 *Kalendarzyk Polityczny...* 1838, p. 136; 1839, p. 137; 1840, p. 139; 1841, p. 147. *Pamiętnik Muzyczny Warszawski* 1836, no. 5, p. 80. *Skorowidz mieszkańców miasta Warszawy [...]. Rok pierwszy.* Warszawa 1854, p. 331. Perhaps he is Emil Schwarzbach (*Bibliografia warszawskich...*, p. 388), and not Antoni Schwarzbach, choir teacher in 1835–1838 at a regional gymnasium in Łomża. W. Tomaszewski, *Miedzy salonem a jarmarkiem. Życie muzyczne na prowincji Królestwa Polskiego w latach 1815–1862*, Warszawa 2002, p. 407.

187 *Kalendarzyk Polityczny...* 1842, p. 129; 1843, p. 197.

188 *Kalendarzyk Polityczny...* 1838, p. 136; 1839, p. 137; 1840, p. 139; 1841, pp. 147-148; 1845, p. 285.

probably Julian Wajnert,<sup>189</sup> and then, also in 1845, when it was renamed the real district school, Adam Ostrowski,<sup>190</sup> who was later replaced by Karol de Carmantrant,<sup>191</sup> at first, the students celebrated the gala days with the students of the Provincial Gymnasium in the Visitandines Church, and later in their own chapel.<sup>192</sup>

- district school at Nowy Świat St.;<sup>193</sup> Tomasz Skapczyński<sup>194</sup> was the choir teacher there; students celebrated the gala days in the church of St Alexander.

The result of subsequent organisational changes was the establishment of the third Warsaw Lyceum (in the King John II Casimir Palace)<sup>195</sup> after 1840, where Tomasz Nidecki<sup>196</sup> became the music teacher. Initially, students of this school celebrated festive days in the nearby Carmelites Church, and then in the Visitandines Church, sometimes together with students of the Provincial Gymnasium.

The Government Institute of Governesses and the associated Pensja Wzorowa [Female Academy] resumed their activity at the end of 1831. At that time, an annual exam was held, culminating in

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189 In political calendars, only the name and surname of the teacher were given, but the subject he taught was not mentioned. I determined the teachers of church music and choir in the schools in question on the basis of other sources. The music teacher was usually the person listed last in the list of teachers of a given school and the name of Julian Wajnert was given there, *Kalendarzyk Polityczny...* 1842, p. 130; 1843, p. 198.

190 *Kalendarzyk Polityczny...* 1844, p. 293; 1845, p. 284.

191 *Kurier Warszawski* 1849, no. 335, p. 1755. Karol de Carmantrant had previously been a choir teacher at a gymnasium in Sejny and Suwałki. W. Tomaszewski, *Kronika życia muzycznego na prowincji Królestwa Polskiego w latach 1815–1862*, Warszawa 2007, ref. 619, 628; *Między salonem a jarmarkiem...*, p. 405. He also taught music at the German District School in Warsaw (German–Russian), (*Kalendarzyk Polityczny...* 1844, p. 292; 1845, p. 285) before it was moved to Łódź (*Kalendarzyk Polityczny...* 1846, p. 285).

192 *Kurier Warszawski* 1840, no. 22, p. 1533.

193 J. Schiller, *Warszawskie rządowe szkoły średnie...* op. cit., unnumbered p. 79nn.

194 *Kalendarzyk Polityczny...* 1838, p. 136; 1839, p. 137; 1840, p. 139; 1841, pp. 147–148; 1845, p. 285; *Kurier Warszawski* 1843, no. 233, p. 1113; 1844, no. 236, p. 1121; 1845, no. 113, p. 541; 1846, no. 117, p. 557; 1847, no. 115, p. 541.

195 “On 31 July 1834, the director S. B. de Linde invites to the celebration of the Provincial Warsaw Gymnasium at the Kazimierz Palace”, Warsaw 1834; ibidem, Warsaw 1835.

196 *Kalendarzyk Polityczny...* 1844, p. 289; 1845, p. 280; 1846, p. 279; 1847, p. 280; 1848, p. 278; 1849, p. 278; *Rocznik Urzędowy...* 1850, p. 499.

a “musical rehearsal, during which the students [...], accompanied by instruments, performed some great pieces on the piano composed by fine masters [...]”<sup>197</sup>. The name-day of Empress Alexandra Feodorovna (in July 1835) was celebrated with the “nomination of Her Excellency and the first trial of the institute dress” by the students.<sup>198</sup> Holidays associated with the Empress, as the patron of the Institute, were also celebrated regularly in the following years, including on 13 July 1839, when the students sang in the school chapel “a new Mass by Józ[ef] Krogulski for 3 voices [...]”<sup>199</sup>. In 1838–1843, 11 teachers taught music at this school, including Ignacy F. Dobrzański, J. Elsner, Ludwik Nidecki, Józef Nowakowski, Jan N. Sandmann, Edward Stolpe, and Antoni Teichmann, and Maurycy Pion, and then Konstancja Turczynowicz, taught dance.<sup>200</sup>

Among the government schools for young men, the Faculty School in Muranów resumed education. In July 1832, there was a “show” which ended with singing *Te Deum* in the adjacent Brothers Hospitallers Church.<sup>201</sup> In 1835, “choir lessons were resumed” in the Warsaw Gymnasium in Leszno St.<sup>202</sup> Such classes were also undertaken by the Provincial Warsaw Gymnasium. Its final year celebration was held together with students of four Warsaw district schools in the Kazimierz Palace in “the former academic meeting room”. It concluded with the singing of *Te Deum* and “singing for the longest and happiest reign of the brightest emperor and king” in the nearby Visitandines Church.<sup>203</sup> In 1837, the celebration was

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197 *Kronika życia muzycznego...* ref. 7.

198 *Kurier Warszawski* 1835, no. 184, p. 961.

199 *Kronika życia muzycznego Warszawy w latach 1836–1840*, vol. 2, ref. 5325, 5559, 6705.

200 *Kurier Warszawski* 1840, no. 322, p. 1533.  
On 15/27 August 1843, the institute was officially opened in Puławy, where it was then transferred. *Kurier Warszawski* 1843, no. 234, p. 1117.

201 “For a performance by students of the Faculty School in Muranów, which is to be held on 24 and 25 July...”, p. 7.

202 “The celebration at the end of the year of study at the Warsaw Junior High School in Leszno Street will take place on 30 July 1835...”, p. 4.

203 You are invited to the ceremony of Warsaw Governorate Gymnasium to be held on 31 July 1834 at the Casimir Palace by headmaster S. B. de Linde [...]”, Warszawa 1834; *ibidem* 1835.

completed in the same church with “[...] *Mass* with the accompaniment of wind music by J. Stefani, *Te Deum* of his composition and the hymn *God Save the Emperor*”.<sup>204</sup> In 1842, three gymnasiums (Provincial, Second and Real) and four district schools in Warsaw participated in the celebration.<sup>205</sup> Later (1847) in all the gymnasium schools and district schools, and in the hall of the Kazimierz Palace, after occasional speeches, the hymn *God, Protect the Emperor* “[...] was sung by students gathered in the gallery, under the guidance of a choir teacher, Mr Stefani, with the accompaniment of the organ [...]”<sup>206</sup>. After the celebration was completed, the entire congregation passed to the church of St Cross, where the parish priest of St Alexander intoned the hymn of St Ambrose, “[...] which the students sang...”<sup>206</sup>.

Józef Stefani, then a choir teacher at the Warsaw Governorate Gymnasium, made a special compositional contribution to the repertoire of the student celebrations of the gala days. The composer informed the *Kurier Warszawski* in January 1840 that

To make it easier for choir teachers at provincial gymnasiums and district schools to acquire *Religious Songs* with music of my compositions performed on ceremonial and gala days by students of the Warsaw Governorate Gymnasium in the Visitandines Church, I had the idea of issuing a subscription. *Religious Songs* consists of:  
1) *Mass* for 3 voices; 2) *Mass* for 4 voices (including *Benedictus* for bass solo with 4 voices); 3) *Mass* for 4 voices (*Benedictus* for 4 voices obligato accompanied by choir); 4) *Hymns* for Corpus Christi (4 voices); 5) Songs for Christmas (3 voices); 6) *Te Deum laudamus* (for 4 voices); 7) the hymn by Lvov, *God Protect the Emperor* (for 4 voices with Polish and Russian texts). All these chants are arranged with the accompaniment of organ; old edition. Subscription can be made at Mr. Sennewald's music print workshop [...]; ex-copy price PLN 10 [...].

204 *Kurier Warszawski* 1837, no. 201, p. 982.

205 *Kurier Warszawski* 1842, no. 168, p. 805.

206 *Kurier Warszawski* 1847, no. 171, p. 823.

After six months, “they were printed at the workshop of G. Sennewald” and, with time, gained popularity throughout the Kingdom.<sup>207</sup>

Choir lessons at the Rabbinical School were introduced in 1839 by its director, Antoni Eisenbaum, who made “[...] the students sing on gala days appropriate songs in the national language with a harmonious voice and prepare to sing prayers in Hebrew according to the psalm by [Solomon] Sultzer, cantor of the Vienna synagogue [...]”<sup>208</sup> The gala days were regularly celebrated there under the guidance of a choir teacher, Jan J. Gukkel.<sup>209</sup> Already in 1840, students sang in the school synagogue “psalms” and the cantata *God Protect the Emperor* in Polish and Russian, and the *Alleluia* composed for four voices<sup>210</sup> by the same teacher, and, in the following year, *Te Deum* by J. Elsner.<sup>211</sup> In 1843 “the rabbinical school brought a new choir teacher, Mr. Sternberger from Vienna”<sup>212</sup> From then on, under his guidance, students sang during holidays.<sup>213</sup> Among the compositions that were performed at that time, attention was drawn to the repeated performance of Psalm 21 *Panie mocą Twoją*

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- 207 *Kurier Warszawski* 1840, no. 30, p. 142; no. 190, p. 917. *Bibliografia warszawskich...*, ref. 2526; *Miedzy salonem a jarmakiem...*, p. 368. This publication has not survived, nor is it listed in Stefani's biography in *Encyklopedia Muzyki Polskiej PWM*.
- 208 *Gazeta Warszawska* 1841, no. 184, p. 1; *Kurier Warszawski* 1841, no. 184, p. 881.
- 209 *Z dziejów gminy starozakonnych w Warszawie w XIX stuleciu*, vol. 1. *Szkolnictwo*, Warszawa 1907, pp. 82–83; J. Schiller, *Warszawskie rządowe szkoły średnie...* op. cit., pp. 63–67; E. Kula, “Warszawska szkoła rabinów w protokołach posiedzeń Rady Wychowania Publicznego w latach 1845–1850”, in: *Szkolnictwo, opieka i wychowanie w Królestwie Polskim od jego ustanowienia do odzyskania przez Polskę niepodległości 1815–1918*, Warszawa 2016, p. 151. Although Gukel (under the surname Hukel) was first mentioned in the staff of the Rabbinical School in 1846 (*Kalendarzyk Polityczny...* 1846, p. 280), he taught there much earlier (*Kurier Warszawski* 1840, no. 183, p. 885; 1841, no. 235, p. 1117; *Kalendarzyk Polityczny...* 1847, p. 281; 1848, p. 279; 1849, p. 278; *Rocznik Urzędowy...* 1850, p. 503).
- 210 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 6989, 7147, 7175, 7628.
- 211 *Kurier Warszawski* 1841, no. 115, p. 541; no. 119, p. 561; no. 124, p. 589; no. 178, p. 853.
- 212 *Kurier Warszawski* 184, no. 177, p. 850. He is not mentioned as a teacher by subsequent issues of *Kalendarzyk Polityczny*.
- 213 E.g., *Kurier Warszawski* 1845, o. 337, p. 1617; 184, no. 113, p. 537; 184, no. 324, p. 1541; 184, no. 178, p. 869.

*rozraduje się król*, a composition by Ignacy F. Dobrzyński.<sup>214</sup> During “appropriate” services, the students of the Rabbinical School also sang in the second synagogue – the German synagogue at Daniłowiczowska St. – including *Hallelujah* – joyful praise of God – and *Hanoten teszua lamelachim* – prayer for the ruler. With time, not only the students of the Rabbinical School gathered there, but also the students of “Jewish elementary schools” and then “the entire choir” sang the Lvov’s anthem.<sup>215</sup>

In the Nobles’ Institute, established in 1848, choir lessons were taught as private lessons “for an agreed fee”.<sup>216</sup> In the first years of its existence, Józef Wszebor<sup>217</sup> became the choir teacher, and holidays were celebrated by the students in their own chapel, the consecration of which took place on the opening of the school at Nowolipki St. (in the building of the former gymnasium).<sup>218</sup>

A common feature of gala day services at which students were present was their performance of a specific set of songs. Selected students who “possess musical talent” used to perform the songs. These were usually pieces arranged for a male choir with organ accompaniment or, less frequently, other instruments: 3-4-voice Masses, the hymn *Te Deum*, and the Russian Empire hymn *Bozhe Tzarya Khrani!* [God Protect the Emperor] performed in Russian to the words of Vasily Andreevich Zhukovsky with music by Alexei Fedorovich Lvov. The choir teachers of the given school used to conduct. This repertoire was dominated by Masses by four Warsaw composers: Józef Stefani, Józef Elsner, Karol Kurpiński, and Tomasz N. Nidecki. The students of the Rabbinical School, apart from the Lvov’s hymn, most often sang the thanksgiving *Hallelujah* and Psalm 21.

214 *Kurier Warszawski* 1845, no. 113, p. 541; 1846, no. 195, p. 929; 1847, no. 119, p. 571. The composition is not registered in the composer’s biography, *Encyklopedia Muzyczna PWM*, vol. 2, pp. 424–425.

215 *Kurier Warszawski* 1844, no. 243, p. 1157; 1845, no. 241, p. 1165; 1846, no. 195, p. 929; 1848, no. 242, p. 1173; 1849, no. 117, p. 561; 1850, no. 320, p. 1697. Virtual Shtetl website. Museum of the History of Polish Jews Polin.

216 *Ustawa dla Instytutu Szlacheckiego w Warszawie*, Warszawa 1854, pp. 14–15.

217 *Kurier Warszawski* 1849, no. 335, p. 1755. *Bibliografia warszawskich...*, ref. 3352, 3353.

218 *Kurier Warszawski* 1848, no. 225, p. 1093.

In 1836–1850, Warsaw dailies published nearly 300 notes on students' performances of over 500 pieces of music in connection with the festive days (the number of pieces does not include Lvov's anthem and the psalms and chants of *Hallelujah* and *Hanoten teszua lamelachim*). Typically, these reports included the name of the composer and the title of the piece of music, or just the name of the composer. Therefore, the descriptions do not contain any essential details that would allow a clear identification of a given work.

Works by Józef Stefani were most frequently performed (they are mentioned no less than 180 times). His *Te Deum* was sung over 100 times by students in the following schools: the Governmental Gymnasium (in 1836–1840, 1842–1847, 1849–1850), schools at Nowy Świat St. (in 1839, 1841–1849), schools at Królewska St. (in 1839, 1841), the gymnasium at Leszno St. (in 1841–1844, 1847), and the Real Gymnasium (in 1842–1850). Most often, it would be a 4-voice *Te Deum* published in the collection *Religious Songs On Ceremonial And Gala Days*. Other pieces by the same composer are mentioned, such as the *Te Deum 4te* [4<sup>th</sup> *Te Deum*] written in 1845,<sup>219</sup> *Nowe Te Deum* [*New Te Deum*] for December 18 [1846],<sup>220</sup> and a "new" *Te Deum* composed in 1848 and 1849 is mentioned twice.<sup>221</sup> Stefani's Masses were performed equally often (nearly 70 times), with *Mass No. 2* "C tone" – three times,<sup>222</sup> *Mass No. 3* "with the accompaniment of wind instruments" in E flat – four times,<sup>223</sup> *Mass No. 6* – six times,<sup>224</sup> *Mass No. 9* – five times,<sup>225</sup> and *Mass No. 10* – four times.<sup>226</sup> In addition,

219 *Kurier Warszawski* 1845, no. 113, p. 541.

220 *Kurier Warszawski* 1846, no. 337, p. 1601.

221 *Kurier Warszawski* 1848, no. 338, p. 1625; 1849, no. 335, p. 1755. *Encyklopedia Muzyczna PWM*, vol. 10, p. 90.

222 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 7513; *Kurier Warszawski* 1841, no. 115, p. 541.

223 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 6985; *Kurier Warszawski* 1841, no. 338, p. 1601; 1844, no. 120, p. 651; 1847, no. 119, p. 571.

224 *Kurier Warszawski* 1842, no. 321, p. 1521; 1846, no. 117, p. 557; no. 322, p. 1529; no. 337, p. 1601; 1848, no. 116, p. 561; 1849, no. 117, p. 561.

225 *Kurier Warszawski* 1846, no. 241, p. 1149; 1848, no. 338, p. 1625; 1849, no. 113, p. 545; no. 335, p. 1755; 1850, no. 335, p. 1781.

226 *Kurier Warszawski* 1848, no. 120, p. 581; no. 242, p. 1173; 1849, no. 232, p. 1253; no. 239, p. 1289.

apart from the unspecified “songs” or “pious songs” and “religious” (seven mentions), his *Ojcze nasz* [Lord’s Prayer] was mentioned once.<sup>227</sup>

Among Józef Elsner’s religious works (no less than 72 mentions), students from various schools most often performed his Masses (with 38 indications), and in the second place, *Te Deum* (10 indications), including four times by the students of the Leszno Gymnasium<sup>228</sup> and the Rabbinical School,<sup>229</sup> and twice by the students from the Nowy Świat school.<sup>230</sup> Students from the gymnasium at Leszno St. also sang his *Ave Maria* four times.<sup>231</sup> His “hymn” was also mentioned twice - one for three voices with organ accompaniment - and “a prayer for the entire Imperial Family” is mentioned once.<sup>232</sup> Moreover, “students of the second district school under the direction of their teacher Carmantrant” performed “a trio from the Elsner oratorio”.<sup>233</sup>

Karol Kurpiński’s works were mentioned no less than 50 times, 32 of which were mentions of his Masses. These Masses were most often performed by students from Nowy Świat and Freta Sts. The three-voice *Lord’s Prayer*<sup>234</sup> and his “devotional songs” were also sung.<sup>235</sup> Perhaps these songs come from the collection published in 1825 – *Pienia nabożne [...] z poezją Felińskiego, Minasowicza i innych [...] użytkowi rzymsko-katolickiego chrześcianstwa w Polsce wydane with*

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227 *Kurier Warszawski* 1842, no. 117, p. 557.

228 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 6706, 7513, 7625; *Kurier Warszawski* 1841, no. 119, p. 561.

229 *Kurier Warszawski* 1841, no. 115, p. 541; o. 119, p. 561; no. 178, p. 853; no. 184, p. 881.

230 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 2185; *Kurier Warszawski* 1841, no. 235, p. 1117.

231 *Kurier Warszawski* 1841, no. 323, p. 1529; no. 338, p. 1601; 1842, no. 233, p. 1109; no. 240, p. 1149. Probably B flat major, op. 8. *Encyklopedia Muzyczna PWM* vol. 3, p. 25.

232 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 1166; *Kurier Warszawski* 1842, no. 115, p. 541; 1844, no. 324, p. 1533.

233 *Kurier Warszawski* 1850, no. 120, p. 625.

234 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 4542; *Kurier Warszawski* 1841, no. 119, p. 561; no. 338, p. 1601. *Encyklopedia Muzyczna PWM*, vol. 5, p. 239; *Karol Kurpiński. Kronika*, p. 457.

235 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 2212.

[*Pious Songs with poetry by Feliński, Minasowicz and other [...] for Roman Catholic Christianity published in Poland]*.<sup>236</sup>

Masses by Tomasz N. Nidecki (35 indications) appeared in the student's repertoire when he took up the position of a choir teacher at the Real Gymnasium in Warsaw. They were most often performed by students of this school: *Mass No. 2* (no less than seven times)<sup>237</sup> and *Mass No. 3* (no less than four times).<sup>238</sup> The performance of the *Mass No. 1* preserved in the collections of the Jagiellonian Library is mentioned only once in the journals.<sup>239</sup> It is a "classic" Mass (*Kyrie, Gloria, Graduale, Credo, Offertorium, Sanctus, Agnus Dei*) to the lyrics by K. Brodziński *Z odgłosem wdzięcznych pieni*, prepared by Nidecki "for soprano, alto, tenor and bass with organ accompaniment [...]" His Masses were also performed by students of the district school at Gęsia St.<sup>240</sup> under the direction of Walenty Striebel and students of the Nobles' Institute under the direction of J. Wszebor.<sup>241</sup>

During gala services, students rarely sang the Masses of Józef W. Krogulski (15 indications). While the composer was still alive, his works were selected for his students by J. Piltz, a choir teacher at the Leszno Gymnasium.<sup>242</sup> Later, incidentally, Tomasz N. Nidecki, a choir teacher at the Real Gymnasium, used Krogulski's *oeuvre*.<sup>243</sup>

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236 *Bibliografia warszawskich...*, ref. 679.

237 *Kurier Warszawski* 1846, no. 113, p. 537; no. 234, p. 1113; 1847, no. 119, p. 571; no. 339, p. 1613; 1848, no. 39, p. 185; no. 338, p. 1625; 1850, no. 335, p. 1781.

238 *Kurier Warszawski* 1848, no. 116, p. 561; 1849, no. 117, p. 561; 1849, no. 232, p. 1253; 1849, no. 239, p. 1289.

239 *Kurier Warszawski* 1848, no. 120, p. 581.

240 *Kurier Warszawski* 1848, no. 242, p. 1173; 1849, no. 113, p. 545; no. 117, p. 561; no. 232, p. 1253; no. 239, p. 1289; no. 320, p. 1679; no. 335, p. 1755; 1850, no. 232, p. 1241.

241 *Kurier Warszawski* 1849, no. 117, p. 561; no. 232, p. 1253; no. 239, p. 1289; no. 320, p. 1679; no. 335, p. 1755; 1850, no. 120, p. 625; no. 232, p. 1241; no. 239, p. 1281; no. 320, p. 1697; no. 335, p. 1781.

242 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 5311, 5559a, 6187, 6695, 6706, 6954.

243 *Kurier Warszawski* 1843, no. 113, p. 533; no. 240, p. 1149; no. 321, p. 1521; no. 336, p. 1597; 1844, no. 120, p. 651; no. 236, p. 1121; no. 243, p. 1157; 1845, no. 113, p. 541; 1846, no. 117, p. 557.

Works by other Warsaw composers were rarely used in the student repertoire. These included such composers as: the aforementioned Ignacy F. Dobrzański, whose *Psalm 21* was sung by the students of the Rabbinical School,<sup>244</sup> Jan N. Rostworowski, whose Mass was sung by the students of the Leszno Gymnasium,<sup>245</sup> and Jan Sandmann, whose *Offertory* “solo for alto voice” was performed in the gymnasium’s chapel at Leszno St.<sup>246</sup>

Students rarely performed works by foreign composers (14 mentions in total). These were the works of: Ludwig van Beethoven, whose “hymns” and “prayers” were sung by students of the gymnasium at Leszno St.,<sup>247</sup> Johann N. Hummel and Etienne Mehul, whose songs were sung by students of the Governmental Gymnasium,<sup>248</sup> Mathias Pernsteiner, whose piece was sung by students of the Real Gymnasium,<sup>249</sup> Gioacchino Rossini, whose “prayer” was sung by students of the district school at Freta St.,<sup>250</sup> and Carl M. Weber, whose “prayer” was sung by students of the District School in Muranów.<sup>251</sup> A more varied repertoire was preferred by the teacher and conductor J. Wszebor, whose students in the chapel of the Nobles’ Institute sang Luigi Cherubini’s *Ave Maria*,<sup>252</sup> Gaetano Donizetti’s “duets” and “hymns”,<sup>253</sup> and the motet *O salutaris hosta* by Saverio Mercadante.<sup>254</sup>

Some of the lesser-known choir teachers in government schools for young men were not only conductors but also tried composing themselves. These teachers included: Józef Piltz, composer of *Tu Deum* and *Masses* performed by students of the Leszno

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244 See footnote 209.

245 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 1888.

246 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 1166.

247 *Kurier Warszawski* 1841, no. 235, p. 1117; no. 323, p. 1529; no. 338, p. 1601.

248 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 7514; *Kurier Warszawski* 1843, no. 233, p. 1113.

249 *Kurier Warszawski* 1843, no. 113, p. 533.

250 *Kurier Warszawski* 1844, no. 120, p. 651.

251 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 6186.

252 *Kurier Warszawski* 1849, no. 335, p. 1755.

253 *Kurier Warszawski* 1849, no. 239, p. 1289; no. 320, p. 1679; no. 335, p. 1755.

254 *Kurier Warszawski* 1849, no. 117, p. 561.

Gymnasium,<sup>255</sup> and the aforementioned Wszebor, author of the *Mass* performed at the Nobles' Institute.<sup>256</sup> Emilian Schwarzbach is also worth mentioning. He composed for his students two different *Te Deum* - for four voices with a choir,<sup>257</sup> and a new one, for four voices and two choirs, the last "deliberately" composed for the name-day of Nicholas I,<sup>258</sup> and also different Masses - including one for three voices and another for voices with organ, choir, and trombone accompaniment,<sup>259</sup> and one "new" *Hymn*.<sup>260</sup>

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The factual musical repertoire accompanying the celebrations was their important but stylistically heterogeneous element. It constituted only a small part of all musical works performed in various places in the city at that time.<sup>261</sup> Particular types of works in the areas characterised - theatre performances, occasional balls, ceremonial services - were intended for different venues, for slightly different audiences, and for performers with different artistic and musical backgrounds. The choice of "tools" used for the celebration was not always dictated by their objective aesthetic value. There was a particular connection between the artistic methods of the celebration and the specific rituals and requirements of the etiquette of the Russian court. The main goal was, above all, to sol-

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255 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 1166, 3720, 4643, 6187, 6695. R. Mączyński, *Muzyka i teatr...*, pp. 190, 205–206.

256 *Kurier Warszawski* 1849, no. 117, p. 561; no. 320, p. 1679; no. 320, 1850, p. 1697.

257 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 3923.

258 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 6186, 6953.

259 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 4646, 6694, 6953; *Kurier Warszawski* 1841, no. 115, p. 541; no. 119, p. 561.

260 *Kronika życia muzycznego Warszawy w latach 1836–1840*, ref. 4327, 5561.

261 Contrary to popular belief, there are no detailed studies documenting the musical repertoire of various areas of Warsaw's musical life at that time. It is not only the specificity of the area in which we are interested. As was emphasised, also in European studies "there are no real statistical studies on the musical life of individual centers in the 19<sup>th</sup> century [...], the repertoire and concert programs", which "makes any synthesis difficult, and there are no developed methods of academic understanding of the complex structure of musical life. and its social determinants", I. Poniatowska, *Muzyka fortepianowa i pianistyka w wieku XIX. Aspekty artystyczne i społeczne*, Warszawa 1991, pp. 240–241

emnly honour the Russian emperor, his family, and the customs of the Russian Empire in the area politically subordinate to him, while there were constant changes in legal conditions.

For each of the areas described, the manner of celebration differed slightly in the constitutional period of the Kingdom of Poland after the Uprising. This was due to various reasons. A common element of the festive performances for both periods were the occasional cantatas, known only from titles and press reports. The artistic and literary setting of the performances included the greatest authorities of the theatre scene at that time, luminaries of poetry, and famous Warsaw composers. The cantatas themselves, created on specific orders, had individual performances and were not presented on other occasions. Most of them were composed by Kurpiński, as a result of his duties as a court bandmaster. In their structure, as they were intended to be performed by professional performers, the main role was played by the choir and orchestra of the National Theatre or Teatr Wielki. Sometimes, works were performed by professional actors from the Warsaw theatres so that they seemed more theatrical. At the same time, it was appreciated when the “spoken word was accompanied with music”, resulting in a “perfect expressive effect”, which could be seen as a romantic tendency.<sup>262</sup>

The opera repertoire for gala performances was included in the canon of the European theatre scene at the time. Apart from the popularity of a given work in the theatres of that area, the attractiveness of the local staging was also important. Before 1831, the names of French precursors and representatives of the Romantic opera (Auber, Boieldieu, Dalayrac, Isouard) are most often mentioned, which was consistent with the general profile of the Warsaw opera scene.<sup>263</sup> Even then, there were pressures to give preference to Italian opera and ballet in the theatre’s repertoire, avoiding

262 A. Nowak-Romanowicz, *Klasyczny...*, p. 221.

263 Z. Chechlińska, J. Guzy-Pasiak, H. Sieradz, “Kultura muzyczna Królestwa Polskiego (1815–1875)”, in: *Kultura miejska w Królestwie Polskim*. vol. 1, Warszawa-Kalisz-Lublin-Płock, p. 285.

politically ambiguous topics.<sup>264</sup> After 1831, the process of trivialising the theatrical repertoire deepened systematically, which was also reflected in the repertoire of festive performances.

At that time, concert life in Warsaw developed with its own rhythm. This was when the “music of sublime artistic value was separated from common music, the sphere of which was growing”.<sup>265</sup> Most of the occasional dance music belonged to the latter group of functional pieces, the melody, harmony, and rhythm of which did not go beyond the schematic, simplified solutions. Occasional orchestral dances, mainly polonaises, performed in the theatre during festive performances, did not find their place in the then few concert halls in Warsaw. If they reached the audience, it was through the published piano arrangements because it was the piano that most strongly influenced the musical life of those years, becoming the most common instrument used not only in great concert halls but also in the salons of aristocracy and bourgeoisie and at home.<sup>266</sup> The festive polonaises, especially those composed by Kurpiński – despite their occasional nature – were characterised by deep emotional content and perfectly reflected the Polish spirit of this dance. Often reissued in print, they became forgotten over time, although they undoubtedly deserve to be included in the canon of European polonaise music.

In Warsaw churches of various faiths, great importance was attached to the musical dimension of the liturgy. Those celebrating the Masses “always cared for a rich musical setting” and “almost each of the dozen or so parishes of that time had a – mostly amateur – ensemble that added splendor to the Sunday and holiday liturgy”.<sup>267</sup> The city’s cultural élite appreciated the fundamental importance of music in the temples. From the very first days of its existence, *Kurier Warszawski* was the only newspaper of the capi-

264 A. Kowalczykowa, *Warszawa romantyczna*, Warszawa 1987, p. 35.

265 Ibidem, p. 242.

266 I. Poniatowska, *Muzyka fortepianowa i pianistyka w wieku XIX...*, p. 17.

267 Z. Chechlińska, J. Guzy-Pasiak, H. Sieradz, *Kultura muzyczna...*, p. 293.  
R. Mączyński, *Muzyka i teatr...*, p. 280.

tal of the Kingdom of Poland to systematically inform its readers about the religious music pieces that were performed during Sunday and holiday services.<sup>268</sup>

The participation of musical groups in ceremonial services was common. Often, professional musicians were involved in musical performances. This participation may seem obvious, but we lack information that would confirm how common it was. This especially applies to Warsaw during the existence of the Kingdom of Poland, when music in Warsaw churches was largely subordinated to the ideas of the Society of Friends of Church and National Music, preferring the vocal and instrumental works of the most eminent European masters (primarily Viennese classics), and of local musicians, like Józef Elsner.

The inclusion of choir and music in the education of government schools for young men after the Uprising, although it was inherently aimed at celebrating school services, including those related to festive days, triggered several processes that were particularly important for the nature of church music and the general musical culture of those years. This is because a wider field opened up for composing religious vocal music, with a texture adapted to the possibilities of non-professional performers. Still, it was valuable because it was written by professional writer-teachers. With time, therefore, a canon of the school's religious repertoire, which was not initially very rich, was developed. The same titles were repeated many times and, thanks to occasional services in the parish churches of the city, reached a wide audience. At the same time, the valuable church repertoire from previous years was used, including the works of contemporary European composers.

The celebrations, introduced by the tradition of the Russian Empire, constituted a specific fragment of the history of public life in Warsaw in the 19<sup>th</sup> century. On festive days, these celebrations

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268 This repertoire also awaits meticulous systemisation and in-depth analyses corresponding to the gravity of the subject, which provides valuable information to the biographies of musicians of Warsaw included in *Encyklopedia Muzyczna PWM*, published in 1979–2012.

were deeply involved with all the spheres of everyday life of various groups of the city's inhabitants. The street décor changed, the public got free access to theatrical performances, the festive atmosphere penetrated the social life, and religious communities were obliged to perform ceremonial service. With time, the catalogue of these holidays changed and expanded, modifying the existing habits and customs. Announcements of the celebrations and their extensive descriptions in Warsaw dailies reached the local audience and subscribers in the provinces of the Kingdom of Poland.

*Translated by Alicja Rosé*

## SUMMARY

The article presents a concise description of the repertoire performed in the years 1815–1850 on public court holidays, the so called “gala gays”, organized by the imperial Romanov dynasty, the then rulers of the Kingdom of Poland. While there are no publications on the subject, these celebrations influenced deeply the whole scope of everyday life of different groups of people living in Warsaw. The sources for this description were Warsaw press and calendars, as well as available research literature on the musical culture in Warsaw at the time. The author presents a general description of the celebrations, their participants, venues and durations and occasions on which they took place. The author also discusses the reasons why Polish composers and performers actively participated in such events. He quotes almost unknown press materials that enlarges our understanding of the musical culture of Warsaw under partition and provides information about the output of the most outstanding composers of the time: Józef Elsner and Karol Kurpiński. Similarly, he names the performers (professional and amateur artists, choirs, orchestras etc.), as well as venues (churches and synagogues, theatres, ballrooms etc.), their public, genres, and indicates the differences in the celebrations after the ill-fated November Uprising (1830).

Given that the artistic character of specific celebrations was related to the peculiarities of Russian court etiquette, the choice of

particular repertoire and performers was not always determined by their objective esthetic value. Both before and after the Uprising typical of such celebrations were the performances of occasional cantatas, which were performed only once and have not been preserved until today. The opera repertoire at the celebrations was typical of Europe in the 1<sup>st</sup> half of the 19<sup>th</sup> century. Gala polonoises, especially those written by Kurpiński, despite their occasional character, were profoundly emotional and representative of the Polish spirit of this dance. The introduction of singing classes to the state-operated schools made it easier to write and perform valuable vocal sacred music, including the works of contemporary European composers.

**KEYWORDS:** Music in the Polish Kingdom, musical culture of Warsaw in 1815–1850, gala days, Józef Elsner, Karol Kurpiński



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